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ABSTRACT

This curriculum guide consists of materials for use in teaching a competency-based course to prepare students for employment as medical secretaries or medical office assistants. The first part of the guide contains introductory information, including a description of the development of the guide, an equipment list, a list of criteria for evaluating the mailability of typewritten or processed documents, a sample word processing concepts course outline, descriptions of different office environments, an outline of procedures in the word processing cycle, and a task list for medical secretaries and medical office assistants. The 145 tasks addressed in the guide are organized around the following 13 job duties: receiving and interviewing people; performing telephone operations; handling mail; performing accounting, banking, credit, and payroll functions; preparing documents, correspondence, and reports; maintaining files, records, and logs; duplicating and assembling documents; performing word processing; maintaining inventories; maintaining machines and office equipment; performing medical specialties; supervising and training; and performing clinical tasks. Included on the task sheets are a task statement, achievement indicators, evaluation criteria, lists of equipment needed, student learning activities, teacher activities, and a performance test description. A 20-page bibliography is also provided. (MN)

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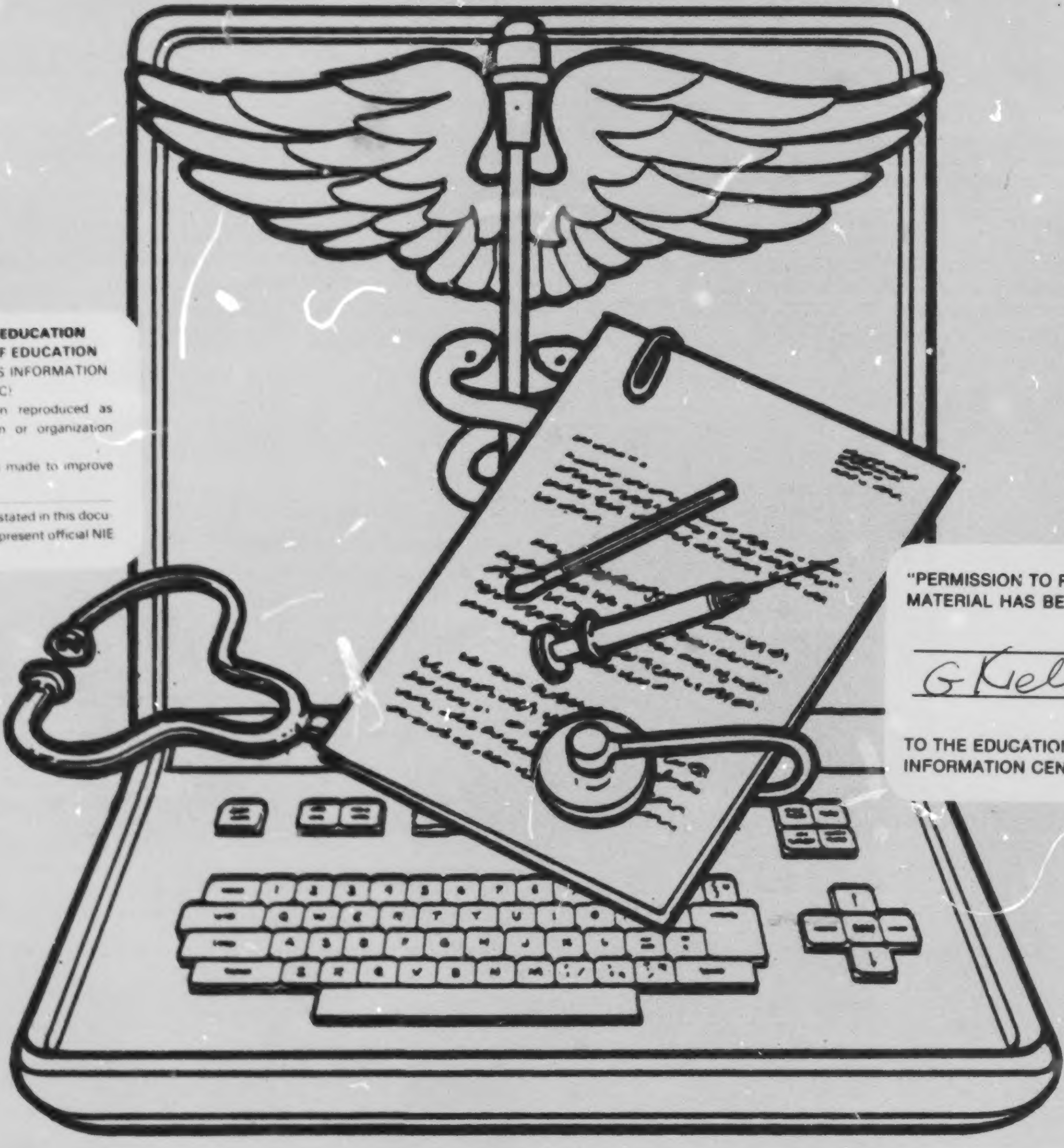

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MEDICAL SECRETARY AND MEDICAL OFFICE ASSISTANT CURRICULUM GUIDE

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Cover design by Instructional Materials Development, Capital Area Career Center

INTRODUCTION

This medical secretary/medical office assistant curriculum guide was developed through a project funded by the Michigan State Board of Education, Michigan Department of Education, Vocational-Technical Education Service. The project was located at Michigan State University in the College of Agriculture and Natural Resource, Agriculture and Natural Resources Education Institute (ANREI) and is known as the Curriculum Resource Team. The project was directed by Dr. Chris M. Olson, Curriculum Resource Team Coordinator, and monitored by Mary Hedges and Leutisna (Newby) Riddle, Vocational-Technical Education Specialists.

While development of the curriculum guide was the responsibility of ANREI, every attempt was made to involve representatives of business and industry. A survey of 222 incumbent workers in 17 related occupational areas within the clerical and secretarial field was conducted throughout the state of Michigan. The final curriculum guide is representative of the tasks clerical and secretarial workers perform on the job as a result of that survey.

The medical secretary/medical office assistant handbook reflects CIP Codes 07.0601 and 17.0503 program descriptions and the following job titles:

*CIP CODE	PROGRAM DESCRIPTION
07.0601	Secretarial and Related Programs
17.0503	Medical Office

The Secretarial and Related Instructional Programs prepare individuals to record and transcribe communications, to provide administrative support, and to abstract, classify, and file information. Word processing skills are an integral part of the instructional program for all clerical/secretarial business education and medical office assisting students.

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*CIP (Classification of Instructional Programs) replaces the previous United States Office of Education (O.E.) code structure.

The Medical Assisting program prepares individuals to assist a physician by performing functions related to both business administration and clinical duties of a medical office. Business aspects of instruction cover insurance accounts, reports, medical records, and medical transcription. Clinical aspects of study include preparation of the patient for examination, assessing vital signs, assisting with examination and treatment, performing routine laboratory procedures, and the using of the electrocardiograph machine.

The combined secretarial/medical office program will prepare students for employability in one or more of the following occupational areas:

JOB TITLE	**D.O.T. CODE
1. Medical Assistant	079.367-010
2. Medical Secretary	079.367-010
3. Medical Transcriptionist	202.362-014
*4. Administrative Secretary	169.167-014
***5. Word Processing Correspondence Secretary	203.362-500
6. Stenographer (Communications Specialist)	201.362-030
7. Transcriptionist	202.362-014
8. Clerk Typist	203.362-010
9. Typist	203.582-066
10. Correspondence Clerk	209.262-010
11. File Clerk (Information Specialist)	206.362-010
12. Reprographics Clerk	207.682-010 207.682-014 207.685-014
13. General Office Clerk	209.562-010
14. Mail and Order Clerk	209.587-026 249.367-054
15. Receptionist and Communications System Operator	207.367-038

JOB TITLE	**D.O.T. CODE
16. Shipping, Receiving, and Stock Clerk	219.367-030 219.367-034
17. Proofreader	209.387-030
18. Traffic, Rate and Transportation Clerk	214.587-014 214.362-038

*Administrative Secretary (AS):

A specialist who performs nontyping tasks, such as filing, processing the mail, handling telephone calls, and other supportive services for management. Also called administrative support secretary or administrative services specialist.[1]

The following job responsibilities and duties are performed most often (70 percent or more of the time) by Administrative Support Secretaries: composing written communications from oral directions; answering routine correspondence without directions; composing from employer's longhand notes; typing tables, speeches, reports, and news releases; answering the telephone; organizing flow of incoming mail; meeting callers; making appointments for employer; scheduling conferences and meetings; maintaining general and desk reference files; making recommendations concerning office systems, procedures, and supplies; and using a copy machine. More of the working time of Administrative Support Secretaries is spent in the area of written communications than in other areas.[2]

**D.O.T. code refers to the Dictionary of Occupational Titles as developed by the U.S. Department of Labor.

[1] Mona J. Casady, Word Processing Concepts (South-Western Publishing Company, 1980), p. 181

[2] Ibid, p. 182.

***Correspondence Secretary (CS):

A specialist who performs the typing, transcribing, and revising tasks for management.[3]

Word Processing Operators/Correspondence Secretaries are expected to provide "back-up" administrative support in organizations when needed.

The following job responsibilities and duties are performed most often (70 percent or more of the time) by Word Processing Operators/Correspondence Secretaries: typing letters, memos, and reports ten or fewer pages in length; typing original one-time correspondence; typing from handwritten input; typing documents requiring light revisions; proofreading typed documents; organizing and maintaining a filing system for stored or recorded data; logging work in and out; taking general care of office equipment; operating dictation equipment; using the dictionary and word processing manuals; and following the directions of supervisors. Considerably more of the working time of Word Processing Operators/Correspondence Secretaries is spent on activities associated with typing and transcription than on tasks involving other functional office areas.[4]

The major competencies required by entry-level Correspondence Secretaries and Administrative Support Secretaries are:

1. Typing with accuracy from typed copy, from handwritten copy, and from rough draft within a satisfactory length of time.
2. Correctly applying grammatical and transcription rules in typing letters, memos, and other kinds of typing of varying lengths.
3. Following directions.
4. Listening.

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[3] Scriven, et. al., Summary Report of National Study of Word Processing Installations in Selected Business Organizations (Delta Pi Epsilon, Publisher, 1981, p. 37.

[4] Ibid.

Administrative Support Secretaries need these additional competencies:

1. Ability to use a filing system.
2. Ability to answer incoming telephone calls.
3. Ability to effectively meet and greet people.[5]

The following course designations will be used with the 07.0601, Secretarial and Related Programs, CIP Code:

Course 01 Stenography Laboratory. This instructional program prepares students for occupations concerned with minor administrative and general office duties in addition to taking and transcribing dictation. Course 01 will prepare students for secretarial occupations which require stenography to be used on the job or where stenography is a prerequisite for employment or promotion. The stenographic block will provide instruction for complex shorthand outlines and speed development. In addition, the following skills will also be taught: advanced typing, word processing concepts and skills; business spelling; business mathematics; English composition and grammar skills; electronic business machine skills; machine dictation and transcription; reprographics; mail techniques including electronic mail concepts; filing methods including micrographic concepts; telephone techniques; human relations skills; and employability skills. A prerequisite of one year of stenography is a recommendation for entry into the stenographic block.

Course 02 Clerical Laboratory. This instructional program prepares students for occupations concerned with general office duties. Heavy emphasis will be placed upon spelling, grammar skills, and machine dictation. All of the skills taught in the Stenography Laboratory will be taught in the Clerical Laboratory with the exception of stenography. A prerequisite of one year of typewriting is a recommendation.

Course 03 Legal Secretarial Laboratory. This instructional program prepares students to transcribe, from shorthand notes and/or machine dictation into typewritten mailable format, legal papers and correspondence such as summonses, complaints, motions, and subpoenas. The student will learn to keyboard, input, edit, and revise legal documents and correspondence utilizing word processing equipment. The student will perform secretarial duties utilizing a knowledge of legal terminology and legal procedures. The student will become familiar with law journals and legal publications. A prerequisite of one year of typewriting and stenography is recommended.

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[5] Ibid, pp. 37-38.

Course 04	Medical Secretarial/Medical Assisting Laboratory. This instructional program prepares students to perform secretarial, clinical, and laboratory duties in a medical office or other health care facility. Students will utilize medical terminology; learn hospital, clinical, or laboratory procedures; and understand legal and insurance forms. The student takes dictation in shorthand or uses a transcribing machine; and compiles and records medical charts, case histories, reports, and correspondence into typewritten mailable format. The student will learn to keyboard, input, edit, and revise medical records and correspondence utilizing word processing equipment. A prerequisite of one year of typewriting and stenography is recommended.
Course 05	Combination Laboratory. This instructional program will be designated for those programs operating as a combination of two or more of the above courses.
Course 06	*Co-op Related. Students electing co-op, who have previously taken two semesters of a two-hour block, may designate either two of the following options as their related class: (1) One hour of a two-hour block, provided the instruction is individualized. (2) A one-hour co-op related class comprised of a related cluster of job skills.

Business and Office Cluster

Approved programs in the business and office cluster (07.999) are a combination of the following programs: 07.0101, Accounting and Computing; 07.0301, Business Data Processing; and 07.0601, Secretarial and Related Programs. The "cluster" concept is a comprehensive delivery system which affords students the opportunity to access employable skills in one or more occupations within Business/Office Education.

The following occupations are included within the Business and Office Cluster. Tasks for remaining occupations are contained within their respective guides.

**Accounting and Computing Occupations

1. Inventory Control Clerk	D.O.T. 222.387-026
2. Cost Clerk	D.O.T. 216.382-034
3. Bookkeeper I	D.O.T. 214.382-014
4. Bookkeeper II	D.O.T. 210.382-018
5. Insurance Clerk II	D.O.T. 205.567-010

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*See Appendix for Secretarial and Related Co-op Guidelines.

**Accounting and Computing Curriculum Guide

6.	Classification Control Clerk	D.O.T. 210.382-030
7.	Invoice Clerk	D.O.T. 214.382-014
8.	Payroll Clerk	D.O.T. 215.482-010
9.	Traffic Clerk	D.O.T. 214.362-038
10.	General Ledger Bookkeeper	D.O.T. 210.382-046
11.	Accounting Clerk	D.O.T. 216.482-010
12.	Account Information Clerk	D.O.T. 210.367-010
13.	Credit Clerk	D.O.T. 205.367-022
14.	Billing Control Clerk	D.O.T. 214.387-010
15.	Audit Clerk	D.O.T. 210.382-010

*Data Processing Occupations

1.	Data Entry Operator	D.O.T. 203.582-030
2.	Terminal Operator	D.O.T. 203.582-054
3.	Computer Programmer	D.O.T. 213.362-010 (Bus: 020.162-014: Engr. Sci 020.167-022)

Secretarial Occupations

1.	Administrative Secretary	D.O.T. 169.167-014
2.	Word Processing Correspondence Secretary	D.O.T. 203.362-500
3.	Stenographer (Communications Specialist)	D.O.T. 201.362-030 D.O.T. 202.362-014
4.	Transcriptionist	D.O.T. 203.362-010
5.	Clerk Typist	D.O.T. 203.582-066
6.	Typist	D.O.T. 209.262-010
7.	Correspondence Clerk	D.O.T. 206.362-010 and 206.367-014
8.	File Clerk (Information Specialist)	D.O.T. 207.682-010, 207.682-014, 207.682-018, and 207,685-014
9.	Reprograhics Clerk	D.O.T. 209.562-010
10.	General Office Clerk	D.O.T. 209.587-026 and 249.367-038
11.	Mailing and Order Clerk	D.O.T. 219.367-030 and 219.367-034
12.	Shipping, Receiving and Stock Clerk	D.O.T. 209.387-030
13.	Proofreader	
14.	Traffic, Rate, and Transportation Clerk	D.O.T. 214.587-014 and 214.362-038 D.O.T. 202.362-014
15.	Medical Transcriptionist	D.O.T. 201.362-014
16.	Medical Secretary	D.O.T. 079.367-010
17.	Medical Assistant	D.O.T. 201.362-010
18.	Legal Secretary	
19.	Receptionist and Communications System Operator	D.O.T. 207.36[illegible]

To foster the cluster concept, V-TES is exploring the development of occupational tasks for secretarial-related occupational disciplines. For example, Graphic Arts tasks for such occupations as communications specialist, forms

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*Data Processing Curriculum Guide

designer, keyboard operator, keyliner, and offset press operator are being developed. When the curriculum is completed and disseminated, advanced secretarial students desiring these occupational skills may filter into the Graphic Arts Department to acquire supplemental skills which enhance the students' employability, provided the instruction is individualized.

According to the National Study of Word Processing Installations undertaken by Delta Pi Epsilon, the following are recommendations for business education departments.[6]

1. Business education departments should emphasize in their curricula (in order to prepare students better for entry level jobs in word processing) the following: typewriting with accuracy (at least 50 wpm), using transcription equipment, using English correctly, listening and following directions, utilizing manuals, setting priorities, and working as part of a team.
2. Business education departments should emphasize the following in typewriting courses: formatting and document requirements; longer typing jobs with the use of a team approach on some of these jobs; simple and complex statistical typewriting; proofreading of typewritten work, letters, memos, and reports and typewriting from handwritten input of varying styles.
3. Because many of the organizations are using some form of work measurement, students should be exposed to various work measure practices and types of employee evaluations used in business (see Appendix).
4. Because word processing is expected to continue to grow rapidly, business departments should have as their goal the incorporation of vocabulary, organization, and competencies necessary for office workers to be successful in entry-level word processing positions either as word processing operators or as administrative support secretaries. Since entry-level tests are similar for both positions, schools can achieve their goals through a balanced secretarial program with secretarial procedures, magnetic keyboarding, machine transcription and shorthand. Shorthand may be particularly helpful for beginning employees in administrative support secretarial positions.

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[6] Ibid, pp. 39-40.

5. Business departments need to stress English skills to a much greater extent. At the same time, however, these fundamental weaknesses should be brought to the attention of the English departments and central administrators in order to determine what can be done in English courses and other courses to help more students develop greater facility in English usage.

6. Programs preparing persons for office positions should include a strong focus on the relationship between data processing and word processing. At a minimum level, this should include an overview of the two types of information systems, their similarities, their differences, and how they may interface operationally in the modern office.

7. Office workers, especially word processing employees, should be provided a strong background in data processing because of the increased interaction between word processing and data processing.

8. Many of the needed competencies should be learned on the job or on the job and in school. Therefore, educational institutions involved in the preparation of office workers should work cooperatively with organizations hiring word processing employees to see whether the schools' programs can be integrated with the needs of word processing installations in the area. This involves determining the job requirements, adapting the curriculum, and helping place students in jobs. Serious efforts should be made by both groups to develop internship programs and cooperative education programs.

9. Educational institutions preparing office workers should maintain close contact with word processing installations to determine changes taking place in career paths for word processing employees. While half of the organizations in this study do not have career paths at this time, many of the decision makers indicated they expect changes in career paths in their organizations. Since turnover is a problem in word processing installations as it is in office jobs in general, the career paths are likely to become more prevalent and definite, providing greater incentives for word processing employees.

10. Post secondary educational institutions should provide training supervision for office workers. In addition, they should offer assistance to organizations with their in-house training programs for word processing operators, administrative support secretaries, and supervisory personnel.

Throughout this curriculum endeavor, pilot teachers were encouraged to select student learning activities for all tasks which would prove student grammar, spelling, vocabulary, and punctuation deficiencies. While attempting to individualize the tasks to fit student needs, teachers should consult local advisory committee members to determine the kinds of student activities they think should be utilized to strengthen these skills. Advisory committees should be consulted to discuss the curriculum; some members might suggest appropriate evaluation criteria for various tasks relative to local business and industry standards.

Advisory committees and word processing associations should be consulted for leads when seeking co-op jobs. Local employers must be informed of a school's word processing program, especially if the program was recently established. Because of the high demand for word processing personnel, skilled students should have little trouble locating jobs.

Teachers must begin to communicate, work with, and learn from each other, especially in Business/Office Education. As data processing and word processing merge, data processing and word processing teachers should become more closely allied: teachers should become familiar with equipment in the respective occupations, secure mutual class speakers, explore team teaching techniques or utilize the "cluster" concept, rally as a unified business group to sharpen skills for Business and Office Education Clubs (BOEC) competitive events and Health Occupations Students of America (HOSA) (clinical and clerical) competitive events.

One example of a team teaching curriculum approach, in an effort to reduce the teaching of duplicate tasks, is the Medical Office Curriculum Guide. The Medical Office Curriculum Guide is entitled Medical Secretary/Medical Office Assistant. As the title implies, tasks for the two occupations are represented.

One method of teaching skills for both occupations is to "team teach" the clinical tasks to the entire group and subsequently "team teach" the administrative tasks to the same group.

Students must be able to choose various occupational goals; once those skills have been acquired, the program should be flexible enough to afford the student the opportunity to pursue additional occupational goals in a related business field. For example, if a medical secretarial/medical office assistant student accomplished the tasks necessary for employability and then decided he/she wanted some business data processing skills, some logistical plan should be established to accommodate the student's interest. One method, requiring V-TES approval, is the Cluster Concept, identified as CIP Code 07.9999. Approved programs in the business and office cluster (07.9999) are a combination of the following programs: 07.0101, Accounting and Computing; 07.0301, Business Data Processing; and 07.0601, Secretarial and Related Programs. The "cluster" concept is a comprehensive delivery system which affords students the opportunity to access employable skills in one or more occupations within Business/Office Education. Programs under the cluster code include a comprehensive career development component. The "cluster" concept requires many changes in traditional program development and delivery. Modifications in facilities and curriculum are usually required.

We, as educators, must realize that "information processing" is an employment field in high demand, filled with various "career ladders." We must respond with instructional plans which will adequately prepare our students for the challenge of change (see Appendix for career ladders).

Some experts feel that the present word processing objectives will change by 1985.[7]

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[7] "Survey Results: Getting Back on Course," Words, August-September, 1981, p. 32.

Professional and secretarial productivity will be scrutinized; workers will be expected to willingly adapt. Managers will no longer consider word processing equipment just a "document production" tool, but will view the equipment and process as a management tool and eventually become more comfortable with "high technology" equipment. Employers will scrutinize and re-evaluate their on-the-job training programs due to their need to train office staff on high technology equipment. Employers will begin testing for language arts skills in addition to typing skills to screen prospective word processing secretaries.

It is hoped that we will want to adapt to change and become more comfortable with high technology equipment as we attend word processing seminars, professional organization meetings, classes, vendor training programs, and read, read, read; thus, we can serve as the "change" example for our students and expect them to meet the challenge the year 2000 will bring.

Questions and Answers for the Secondary Secretarial and Related Occupational (07.0601) Curriculum Guides

1. What are the Michigan secretarial and related occupational (07.0601) program guides?

   The curriculum guides are a list of duties, task statements, achievement indicators, criteria, tools, equipment, and resources that provide the base for a secretarial office education preparatory curriculum for selected entry-level secretarial/clerical occupations. It does not provide specialized competencies for each job title nor all the various occupational areas found in secretarial and related occupational programs.

2. Why was there a need to develop a Michigan Curriculum Guide?

   It was necessary to design a Michigan Curriculum Guide so that teachers would have a research-based common core of competencies to teach in secondary secretarial and related occupational (07.0601) programs.

3. How were the Secretarial and Related Occupational (07.0601) Program Guides developed?

   The Guides were developed throughout 1980-81 and 1981-82 school years by a review team of business and industry, high school, community college, university, and state personnel.

4. Why was occupational research used as a basis for the Curriculum Guide?

   Vocational education curriculum must be based on occupational analysis. Job duties and tasks are used by industrial, educational, governmental and private agencies, and employee organizations for the planning of educational programs.

5. Are there alternatives to using the Curriculum Guide?

   Yes, but since vocational education curriculum is based on occupational analysis, it would be necessary to conduct task analysis, identify competencies, validate competencies, construct and field-test instructional materials, evaluate and provide instruction. Few, if any, instructors or districts have the ability to do this kind of activity.

6. When should Michigan secretarial and related occupational (07.0601) program teachers begin to use the Curriculum Guide?

   Since the new Guide essentially replaces the old Michigan Minimum Performance Objectives, instructors should begin as quickly as possible to incorporate the features of the Guide into present course content and outlines.

7. Will task statements replace Michigan Minimum Performance Objectives?

   Yes. It is the intent of the Michigan Department of Education, Vocational-Technical Education Service, to adopt the task format to replace the Michigan Minimum Performance Objectives.

8. What is a task statement?

It is a statement of job performance. It has six basic parts. They are:

A. Worker actions that consist of one action verb.
B. Worker actions that consist of an object of the action.
C. Machines, tools, equipment, word aids, data, people, attitudes, knowledge.
D. Purpose of worker action.
E. Materials, products, subject matters, and services.
F. Instructions and judgment.

9. How does the state of Michigan Core Curriculum relate to Competency-Based Education?

A competency is defined as a knowledge, attitude, and skills necessary for effective job performance. Accordingly, the tasks identified are reflective of competencies needed by entry-level employees in selected occupational areas. Thus, the Guide is CBE.

10. Will V-TES mandate the Curriculum Guide?

No, it is the philosophy of vocational education that all curriculum should be based on task research. Therefore, V-TES has developed a research-based Curriculum Guide which is encouraged as a resource for local curriculum planning.

11. How long does it take for a student to accomplish the Michigan Core Curriculum?

Accomplishment of the job tasks included in the Guide will vary because of individual student abilities.

12. What happens when a student completes all the task statements in the Curriculum Guide?

The Guide is designated as a resource for selecting tasks for your program in consultation with your advisory committee. It is not intended that any or all students should complete every task in the Guide.

When a student completes task statements relative to his/her immediate occupational goal, a student may articulate into an accounting or data processing program to gain "cluster" skills, provided the training institution has adopted the 07.9999 CIP Code Program.

14. What is the Business and Office "Cluster"?

Approved programs in the business and office cluster are a combination of the following programs:

07.0101, Accounting and Computing; 07.0301, Business Data Processing and 07.0601, Secretarial and Related Programs. The "cluster" concept is a comprehensive delivery system which affords students the opportunity to access employable skills in one or more occupations within Business/Office Education. Cluster programs include a comprehensive career development component. The "cluster" concept requires many changes in traditional program development and delivery. Modifications in facilities and curriculum are usually required. Contact the V-TES Secondary Unit for additional information.

14. How are grades assigned to students using the Curriculum Guide?

Grading should be based on individual teacher assessment for level of competence. The task statements become just one element of a total grading scheme which includes attendance, tests, attitude, and other methods used to establish an individual student grade.

15. How can the Michigan secretarial and related occupational (07.0601) program teachers use the Guide?

Michigan secretarial teachers can use the Guide to adapt present course outlines and to establish a comprehensive student achievement record utilizing the task list and student certificate.

Tasks within the Guide should form the structure for a program. Current teaching materials can be interfaced with the appropriate tasks.

16. What are some advantages of the Secretarial and Related Occupational (07.0601) Program Guides?

Some of the advantages of using the Guide are:

A. Provides a suggested, easy to use guide for preparatory programs in steno/clerical, medical office/medical assisting, and legal office education.

B. Provides an easily understood curriculum for the business community.

C. Provides a curriculum that can be articulated with post-secondary educators or employers.

D. Provides a curriculum that can be transferred from one high school to another within the State.

E. Provides achivement indicators for performance evaluation.

F. Provides a student achievement record.

G. Provides a vehicle for BOEC competitive events.

The Michigan Department of Education, Vocational-Technical Education Service. is indebted to the following individuals who were instrumental in the development of the Medical Secretary/Medical Office Assistant Handbook:

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EQUIPMENT LIST

CIP CODE 07.0601

SECRETARIAL AND RELATED PROGRAMS

The following list of equipment is based on a 22:1 student/teacher ratio. The secretarial laboratory should comprise 50 square feet per student.

*It is expected that prices will decrease through 1985 for text processing workstations, with annual average decreases in the 5% to 7% range.

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*"Technology: What's On the Horizon," Computerword OA, March 31, 1982, p. 46.

MAXIMUM EQUIPMENT FOR SECRETARIAL BLOCK LABORATORIES

MAXIMUM (IDEAL) EQUIPMENT

1. 22 Workstations
2. 22 Typewriters (electric, electronic, or keyboard terminal—microcomputer or word processor)
3. Wireless stenography laboratory
4. One inexpensive photocopier
5. 4 terminals
6. One Printer
7. 4 Printwheels (at least two styles)
8. 22 Disks (one per student) and 8 backup—total 30 disks
9. One dictation/transcription machine for every 2 students
10. One electronic calculator for every 2 students
11. 4 Copyholders
12. 2 dozen ribbons (one per student)—fabric ribbons preferred over carbon multi-strike
13. One auto sheet feeder per printer (optional)
14. One continuous forms tractor per printer
    (continuous rough draft paper instead of loading printer)
15. Interoffice telephone (trainer) and communications line
16. Diskette file for teacher
17. Each workstation should consist of a keyboard, screen, CPU and disk drive; each student should have minimum page storage; each student should have storage capability to access 40 pages of stored material plus storage for program access; if workstation does not have disk drive, students can share the disk drive
18. Inexpensive continuous form (junk) paper 9 1/2" x 11"
19. 15 lb. continuous bond (1 box per printer)
    (less expensive and adequate; single part continuous)
20. OCR optional add-on
21. Phototypesetter optional (for skill centers, area centers, or high schools possessing graphic arts equipment) to tie-in with graphics program

Program Recommendations:

1. Programs should include a good scheduling plan so students will have adequate time to learn the basic word processing text-editing functions.
2. Equipment should be software upgradeable, disk drive, minimum 8-line screen and the ability to add on features such as telecommunications, data processing, accounting, and graphics.
3. Equipment should have expandable storage capability.
4. Equipment should have the basic text-editing features: format, automatic wrap-around, centering, indent, decimal tab, cursor control, copy, move, insert, delete, headers, and footers.
5. School districts are encouraged to purchase the lower-cost systems.
   When purchasing equipment, districts should consider a clustered or shared system in an attempt to bring the cost down; systems sharing a printer should be investigated.
   School districts are encouraged to examine systems in the $8,000 range (exclusive of maintenance) or shared systems to bring the price down to this level, or lower, per keyboard. Microcomputers (an inexpensive approach) equipped with word processing software may be utilized in secretarial laboratories.
   Industry standard for calculating maintenance charges is approximately 10-12% of the total cost of the system per year.

MINIMUM EQUIPMENT LIST FOR SECRETARIAL PROGRAMS

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BY MARLY BERGERUD

WP CLASSROOM

Text-Editing Will Change With Time

IT WOULD BE STARTLING if someone said that the concept of word processing is dead. For many years the media has been preaching that text-editing is here to stay. The truth of the matter is that the word processing industry is very much alive; however, it will look different in the future than it has during the past 18 years.

In the 1960's and 1970's the emphasis in office automation was directed at improving clerical productivity. This was accomplished through the implementation of text-editing equipment located in centralized work environments. Functions of primary concern were playback speed of the printer, size of the CRT display, and size and types of storage. During this same period of time, educational institutions and business organizations began to implement text-editing curricula.

During the 1980's and 1990's the increased need for information, combined with decreased technological costs, expanded power of microprocessors, and storage capabilities will all change the emphasis of office automation. Therefore, technology today is moving toward increasing productivity of executives and all classes of office workers through the use of computer-based office systems.

The newer equipment will be easier to use, handle text and other applications, provide access to a variety of data bases, and instantly access information for executives within their companies. Therefore, some executives may choose to create their documents directly on to a computer-based office system.

Changes

The word processing concept should be placed in its proper perspective. Text-editing (as we have known it for the past two decades) is really a very small part of the entire office automation picture. Instead of being the only technology in the office, it will become one of the most important functions in a variety of office technologies.

Users may purchase text-editing equipment as a feature supplied by a multifunctional system, rather than an individual function of a full-fledged dedicated text-editing system. The multifunctional system will be a general purpose microcomputer, a terminal, or a basic work station.

The 1960's and 1970's style of organization for text-editing applications will probably change. It has already been altered by many companies where smaller centers are created to meet the needs of departments that can't support individual text-editing systems. Users will demand local centers (or work groups) that support fewer users.

Work groups that are located close to users will permit a better working knowledge and sometimes more dedicated service. Individual secretaries may also get electronic work stations so they can adequately support the activities of their supervisors. Executives will have work stations that will not only be used to access, analyze, and distribute information, but also to support the initial creation and revision of text documents.

Transitions

The word processing industry is in a transitional period and will become (in some ways) less important. It will stop being the focal point of office automation and take its place among a whole group of office activities. However, the importance of text-editing will increase as more people begin to utilize software to readily create and manipulate text.

Not only text-editing, but most office activities can be better supported through the use of computer technology. Multipurpose systems will permit the computer to become a reality for all office users, from clerks up to the highest executive levels. ▬

Marly Bergerud is a professor at Cypress College in Cypress, Calif., and president of Infopro, a word/information processing consulting firm in Los Alamitos, Calif. She is co-author of Word/Information Processing Concepts and Word Processing: Concepts and Careers, published by John Wiley & Sons in New York City, and is a nationally known lecturer on education and industry.

By MARLY BERGERUD

WP CLASSROOM

Educators Inform Students of Future Careers

THE ABILITY TO CREATE, manipulate, and communicate information through the use of microprocessor chips or computer systems may be referred to as computer power. Wide distribution of computer power is beginning to affect people everywhere. However, some fear that skills development and potential for growth may be restricted with such vast technological advancements. To reduce this concern, educators should make every attempt to inform students not only of word/information processing careers, but of the vast array of jobs being created through advancements in office automation.

For instance, video conferencing enriches communications by providing nonverbal (as well as verbal) communications breakdown. Teleconferencing allows meetings to occur between two or more people in separate locations. This provides information in a timely manner for better decision making and alleviates some travel.

New career paths

Word/information processing systems have enhanced the role of the office worker. Repetitive tasks can now be done by computer power thus freeing the worker to develop other talents such as data gathering, analysis, and composition.

Future technological innovations that could have a positive affect on student career paths are as follows:

- Teleconferencing will be commonly used in the future office. A flat narrow screen may be located on a wall and, ultimately, an entire wall may become the screen. The screen may be holographic (three dimensional) which would allow two groups to appear to be together at one table in one room when, in reality, the rooms, tables, and locations are separate.
- The role of the secretary will be elevated to that of the director of the office command and control center. This center may be a desk with multi-functional capabilities which enables the secretary to receive and send communications electronically by voice, data, video, or graphics. Voice recognition equipment will produce information either on hard copy or on electronic media.
- Paper will still be used, however, electronic media along with voice recognition will replace most needs for paper as a storage and retrieval device.
- The need to physically plug-in word/information processing devices into networks may be replaced by portable speaking and receiving systems.
- One day, portable electronic tablets may deliver reports, newspapers, and books, thus eliminating the need to visit a terminal to acquire and disseminate information. Sitting under a tree in a park or lazily eating lunch while reading a novel from a portable electronic tablet may soon be a reality.

Different applications

Computer power is bringing technological benefits to more areas than just the office. Microprocessor chips are used externally now in heart machines and may soon be improved so that they can be imbedded in the body. For instance, microprocessors may soon be used in prosthetic devices to activate limbs. Chips will also be used to improve vision, hearing, and the operation of other body parts. The application of biological computing devices is just the beginning.

Rapid technological innovations caused by computer power will require educators to assist students in understanding these changes and of their benefits to themselves and society. Students will then be more willing to accept change when it occurs. This interaction will provide educators an opportunity to illustrate clearly the benefits of new skill development and personal growth which can be derived from new technologies.

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By MARLY BERGERUD

WP CLASSROOM

Text-Editing Systems Versus Microcomputers

TECHNOLOGICAL IMPROVEMENTS continue to increase the capabilities of office systems by bringing more computer power to the office environment. These improvements create a justifiable concern among educators as to whether students should be trained in word processing applications and operational techniques on dedicated text-editing systems or on today's microcomputers.

Many educators instruct students in word processing techniques primarily through the use of dedicated text-editing systems which are designed to perform very sophisticated office applications. However, several manufacturers have started to develop word processing software that can run on mainframe computers (many users), minicomputers (two or more users), or microcomputers (one user).

Sophistication

This advancement in software has presented instructors with the capability of teaching word processing concepts on microcomputers. The advantage is that microcomputers are significantly less costly than dedicated text-editing systems. Yet, current software developments for microcomputers are not as sophisticated or advanced as that found on dedicated text-editing systems.

Instructors should recognize that only basic word processing operational concepts can be taught using microcomputer software. Therefore, sophisticated skills and understandings necessary to achieve competence as a trained operator on today's office systems cannot yet be achieved on microcomputers. As the microcomputer, minicomputer, and mainframe software industries mature, so will the level of sophistication of text-editing programs.

Popularity

The underlying reason for the popularity of using microcomputers as teaching tools is its operating system. An operating system is a program of instructions, rules, and procedures that manage the way a computer works. Each computer's operating system is written in a machine language and may come on a diskette purchased from a supplier.

Each vendor of computer products has an operating system that comes with the hardware acquired when equipment is purchased. The various operating systems will recognize and accept only compatible applications programs written for its system.

The following are examples of operating systems:

- BASIC and Apple DOS. The operating system that comes with the Apple IIs is called BASIC. It allows users to program the machine language of BASIC and run those programs. Apple DOS is an expanded operating system that handles running the disk drive when a drive is added to the Apple II microcomputers. If users acquire add-on cards for the Apple, it is possible to run other operating systems such as CP/M.
- CP/M. This operating system (an acronym standing for Control Program for Microcomputers) was one of the first to be developed in the mid-1970s. Because of this, many hobbyists and engineers over the years have designed a variety of applications programs to run under CP/M. It has since become a standard operating system in the industry and is installed on many existing microcomputers. Other operating systems such as CP/M-86 and MP/M have been developed to compliment CP/M so that it can be driven on other office systems.

Educators must look at skills training and determine whether they want to pass along a basic understanding of text-editing through the use of microcomputers, or a more detailed, comprehensive level of competence in word processing applications by way of dedicated text-editing machines. ▬

Marly Bergerud is a professor at Cypress College in Cypress, Calif., and president of Infopro, a word/information processing consulting firm in Los Alamitos, Calif. She is co-author of Word/Information Processing Concepts *and* Word Processing: Concepts and Careers, *published by John Wiley & Sons in New York City, and is a nationally known lecturer on education and industry.*

*MAILABILITY CRITERIA

Criterial for the Evaluation of Typewritten or Processed/Generated Documents in Secondary Secretarial Programs.

Method of Evaluation: Three levels of mailability:

A. M + - Mailable, perfect
B. M - Mailable
C. NM - Not mailable

A. "Mailable +" Standards

1. Document contains no visible errors.
2. All instructions are correctly followed.
3. All errors are corrected--misspellings, typographical errors, incorrect punctuation, incorrect capitalization, incorrect syllabication.
4. Document contains no omission in the body, opening, or closing lines.
5. Document is neatly completed and document parts are well placed on the page.

B. "Mailable" Standards

1. All instructions are correctly followed.
2. Document contains no uncorrected errors--misspellings, typographical errors, incorrect punctuation, incorrect capitalization, incorrect syllabication, or incorrect word division.
3. Document contains neatly made corrections.
4. Document contains less than ideal placement or spacing on page.
5. Document contains omission of enclosure notation or reference initials.
6. Document contains acceptable (but not most desirable) use of capitalization or punctuation.
7. Document contains an omission or addition of word/words which do not change the meaning of a sentence.

C. "Not Mailable" Standards

1. Instructions were not followed.
2. Document contains uncorrected typographical errors.
3. Document contains uncorrected strikeovers.
4. Document contains obvious corrected strikeovers.
5. Document contains neatly made but excessive/visible strikeovers.
6. Document contains misspelled words.
7. Document contains punctuation or capitalization violations.
8. Document contains grammar violations.
9. Document contains undersirable division of words.
10. Document contains omission or addition of word/words which change the meaning of a sentence.

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*Reprinted and revised with permission of the National Office Education Association.

11. Document displays incorrect page placement or spacing.
12. Document contains omission of some part of the document: date, inside address, etc.
13. Document contains distracting corrections such as obvious use of liquid paper or correction tape, smudges, hole in paper, poor alignment, or incomplete erasures.

WORD PROCESSING CONCEPTS COURSE OUTLINE EXAMPLE

The Word Processing Concepts Outline is a recommended sample of topics which should be discussed with students prior to introducing them to actual "hands on" word processing machine skills. Depending upon the skill levels and abilities of the students, it is conceivable that one marking period could be devoted to this project.

It is recommended that teachers review language art skills -- punctuation, capitalization, number usage, syllabication, and word division, spelling, and sentence and paragraph structure prior to the "hands on" machine experience.

The outline can be completed and updated by utilizing the sources contained in the Bibliography of this handbook.

The Michigan Department of Education, Vocational-Technical Education Service, is indebted to Marilyn Popyk -- Director/Instructor, Word Processing Studies, Business and Economics Department, Henry Ford Community College, Dearborn, Michigan -- for authoring the Concepts Outline.

WHAT IS WORD/INFORMATION PROCESSING

I. What is information?

   A. Written
   B. Verbal

II. What is a document?

III. Kinds of documents

   A. Quick/short
   B. Repetitive
   C. Lengthy, text-edited
   D. Boilerplates/canned library

IV. The Office Automation Revolution

   A. The Beginning
   B. MT/ST and typing production
   C. The Word Processing movement
   D. WP is either the focal point of the communications or a major part of the communication/information system

V. Definition

   A. People
   B. Standardized Procedures
   C. New Equipment

VI. Word Processing Cycle

   A. Origination (Input)
   B. Processing (Output)
   C. Reprographics (other methods of output)
   D. Distribution
   E. Storage/Retrieval

VII. Who Uses WP

   A. Managers
   B. Secretaries
   C. Publishers/Editors/Authors
   D. Lawyers
   E. Doctors
   F. Everyone

VIII. Industry Applications

A. Law Firm
B. Medical Hospital
C. Government
D. Insurance Company
E. Publishing Company
F. Advertising
G. Banking

IX. Personnel

A. WP Operations Manager
B. Administrative Support Manager/Supervisor
C. Production Manager/Supervisor
D. WP Specialist
E. Senior WP Specialist
F. WP Center Supervisor
G. Office Services Manager
H. Proofreader

X. Career Opportunities

A. Across the board, in every industry, WP enables people to create and build a career
B. New Titles
C. Job Enrichment

OFFICE ENVIROMENTS

I. Traditional Office Structure

   A. Basic one employer/one secretary relationship
   B. Going by the wayside
   C. Reorganization changes tasks and creates career paths

II. Centralized System (Document Production Center)

   A. Major center services company
   B. Reorganization of tasks
   C. Emphasis on production

III. Decentralized/Networks/Satellites/Work Clusters

   A. Satellite services and supports an individual department
   B. Charge back procedures

IV. Alones

   A. One or two secretaries support a managerial cluster (5 or 6 executives)
   B. Closer to authors: Secretary "ship" returns
   C. Secretaries may share a word processor

ORIGINATION (INPUT) - PHASE I OF WORD PROCESSING CYCLE

I. Who Creates

A. Authors/Principals/Originators
B. Methods--advantages and disadvantages of each

1. shorthand
2. longhand
3. rough draft
4. machine dictation
5. computer dictation
6. computer aided transcription

C. Why--creation of an idea expressed in words

II. Dictation Equipment Media

A. Magnetic Media

1. discs
2. belts
3. cassettes

1. standard
2. mini/micro

B. Discrete Media

1. magnetic--erasable
2. inscribed

C. Endless loop (continuous flow)

1. permanently encased in a tank
2. phone access

III. Categories of Dictation Equipment

A. Desk Top Units

1. dictation
2. transcription
3. combination

B. Portable

1. mini/micro--cassettes
2. can dictate anywhere
3. self-contained

C. Central Recording System

1. endless loop--eliminates handling of media
   a. individual system or
   b. centralized system
2. phone access
3. hospital, for example
   a. phones in surgery room, emergency room, doctor's lounge, chapel, etc
   b. 24-hour dictation service
   c. dictate patient's condition immediately
4. standard cassette recording systems
5. supervisors central monitor

IV. Dictation Equipment Features

A. Automatic gain control
B. Automatic measured review
C. Electronic cueing and index slips
D. Voice Operated Relay
E. Privacy Lockout

PROCESSING

I. Steps in Preparation

   A. Make-ready (set-up transcriber, gather supplies, etc.)
   B. Doing (typing/producing, decision making)
   C. Put-away (tools and supplies)

II. Production

   A. Decisions

      1. format
      2. end-of-line
      3. end-of-page
      4. word selection
      5. which job to do first
      6. how to spell the word
      7. when to begin new paragraph

   B. Evolution of WP Equipment

      1. MT/ST
      2. Magnetic Cards
      3. Cassette
      4. Memory typewriter
      5. Electronic "intelligent" typewriter
      6. Display systems
      7. Time sharing

   C. Natural language keyboard--special computer language not necessary to make machine operate

   D. Operational classifications of systems

      1. menu
      2. coded

III. Review

   A. Revision--authorship changes
   B. Proofreading skills
   C. Typographical errors

IV. Keyboarding - inputting information on electronic/automated unit

COMPONENTS OF WP SYSTEMS

I. Standalone

   A. Self-contained--not hooked up to nor share the processing power of a central computer
   B. Components

      1. keyboard with function key pad/cursor pad
      2. printer
      3. storage console--utilizing floppy disks

   C. Automatic Features

      1. wraparound
      2. erase/backspace
      3. center
      4. decimal tab
      5. indent
      6. global search/replace
      7. moving text
      8. copy text
      9. pagination
      10. right margin justification
      11. merge
      12. add/delete
      13. many, many more

II. Floppy Disks

   A. Mylar coated to capture keystrokes
   B. 5-200 pages of storage
   C. Care and Handling

      1. do not touch the diskette surface
      2. only handle the diskette on the top, near the label
      3. do not use solutions: alcohol, thinner, Freon, etc. to clean the diskette
      4. do not use magnets or magnetized objects near the diskette, can cause loss of data
      5. do not bend or fold the diskette
      6. do not place objects on top of the diskette
      7. do not use rubber bands or paper clips on the diskette
      8. do not write on a label on a diskette. Write the label first, then place it on the diskette
      9. do not use erasers on the diskette
      10. place I.D. labels correctly, never use layers
      11. insert carefully by grasping upper edge and placing diskette into the drive (label facing up)
      12. keep diskette in its protective envelope when not being used
      13. diskette should be stored in their box and set upright when not being used
      14. do not expose diskettes to excessive heat or sunlight
      15. if transported, the diskettes should be kept in envelope and box

WORD PROCESSING SYSTEMS

I. Intelligent Typewriter

  A. Microprocessor/programmable
  B. Automatic WP functions

    1. erase backspace
    2. center
    3. decimal tab
    4. pagination
    5. carrier return
    6. indent
    7. format/phrases/sentences

  C. Storage media

    1. diskettes/mini floppy disks
    2. 5 to 75 pages

  D. May gradually replace regular typewriters
  E. Fits on the secretary's desk
  F. Much easier learning required than blind standalones

II. Blind Standalone

  A. Self-contained unit includes

    1. keyboard
    2. printer
    3. storage media
    4. logic to perform WP functions is hardwired

  B. No visual display
  C. Storage media may be

    1. cards
    2. cassettes
    3. tapes
    4. memory

  D. Advantages

    1. more capabilities
    2. compatibilities
    3. can add options

  E. Disadvantages

    1. takes more space
    2. more expensive
    3. more difficult to learn
    4. no visual capability
    5. slower
    6. not state-of-the-art technology

III. Display Standalone

A. Self-contained unit

1. keyboard
2. printer-separate from keyboard and display
3. sotrage media-floppy disk or mini floppy disk
4. visual display (CRT)
5. internal processing unit

B. Visual display, CRT - cathode ray tube--may be:

1. 24 - character
2. one line
3. six lines
4. partial page
5. full page
6. dual page

C. Displays vary from

1. black on white
2. green on green
3. gray on green
4. white on green
5. amber on brown
6. nonglare screens

D. Advantages of displays

1. see document during creation
2. proofread, correct, revise before printing
3. can see correction when revising rather than strike overs
4. printing and keyboarding can occur simultaneously

E. Disadvantages of displays

1. more expensive than blind
2. eyestrain, fatigue

F. Advantages of display standalone

1. easier to learn
2. easier to use
3. more capabilities
4. can add options
5. state-of-the-art technology

G. Disadvantages

1. more expensive
2. takes more space
3. requires some internal organization changes

IV. Shared Logic

A. Mini computer performs the logic for multiple workstations; referred to as CPU or Central Processing Unit
B. Optional peripherals

  1. additional equipment attached
  2. printers
  3. OCR
  4. phototypesetter
  5. greater processing power

C. If CPU goes down, they all go down
D. Software based system
E. Hard disk storage: floppy disk archives
F. Advantages

  1. can achieve more productivity
  2. more capabilities
  3. can share long jobs
  4. can achieve more cost effectiveness

G. Disadvantages

  1. requires management
  2. requires well-supervised procedures
  3. requires considerable teamwork
  4. high startup costs

V. Shared Resources

A. Independent workstation

  1. individual storage
  2. not dependent on CPU

B. Shares resources such as

  1. volumes of hard disk storage
  2. greater processor power
  3. printers
  4. OCR

VI. Time-Sharing

A. Sharing storage and processing capability for a mainframe computer
B. Word processors serve as terminals to input and send in revisions
C. Subscribers buy time on another organization's computer equipment
D. Makes it possible to send information on other brands of equipment

E. Advantages

1. more capability of functions
2. increased storage capacity
3. lower startup costs

F. Disadvantages

1. requires more skill
2. requires more procedures
3. more technical

OUTPUT - PHASE III OF WP CYCLE - REPROGRAPHICS

I. Impact Printing Devices

- A. Device strikes paper through inked or carbon ribbon; relatively slow and noisy
- B. Daisy Print Wheel
  1. bidirectional
  2. characters on petals
  3. print rapidly; good quality
  4. 350-650 words per minute
  5. variety of typestyles
- C. Thimble
  1. durable and reliable
  2. can print in two-ten languages during same print run
  3. spinwriter appearance
- D. Line
  1. most commonly used as a computer output device
  2. speeds vary from 100 to 3,800 lines per minute
  3. high speed with good quality
- E. Dot Matrix
  1. grouping of tiny rods mounted like hairbrush bristles in a rectangular base (matrix)
  2. selected rods push against paper forming pattern of desired character
  3. 230 lines per minute
  4. can also produce multicolor printing on paper

II. Nonimpact Printers

- A. No printing device hitting the platen; almost noiseless
- B. Ink Jet
  1. characters shaped by spraying of ink onto paper
  2. ink must dry by being absorbed into paper
  3. great demand due to:
     - a. high--volume form letters with automatic paper and envelope handling
     - b. very high playout speed
     - c. excellent original print quality
  4. limitations
     - a. does not create carbon copies or masters for reprographics
     - b. quality ranges of paper that can be used is limited

C. Intelligent Printer/Copier

1. combines laser, computer, some photocopying technology
2. printer/copier combines photocopying and printing features

D. Laser

1. intense, narrow beam of pure red light capable of carrying millions of messages simultaneously
2. possible to design and store in the printer custom-made company logs, type styles, letterheads, business forms, etc.
3. features of some include:

    a. printing on both sides of paper
    b. provide output on film
    c. print information sent to it from a film or from compatible pieces of WP equipment

E. Fiber Optics

1. glass--like tubes as thin as strands of human hair
2. sends light source from one location to another
3. light intensities changed to signals through tubes
4. features

    a. higher quality documents
    b. greater speeds

F. Other Methods of Reproducing Documents

1. repetitive printing
2. carbon

    a. least expensive
    b. must use impact printer

3. photocopier
4. copier/duplicator
5. lithographic
6. offset
7. facsimile
8. phototypesetter
9. spirit

DISTRIBUTION - PHASE IV OF WP CYCLE

I. Electronic Mail/Telecommunications

   A. Getting document from one point to another in fastest way possible/communications
   B. Documents spend 74% of time in distribution
   C. Definition--any information distributed electronically over telephone lines
   D. Information can be sent electronically in the form of:

      1. voice
      2. data
      3. graphic or image
      4. video

   E. Bypass the post office due to its slowness

II. Electronic Mail Systems

   A. Communicating Word Processors

      1. compatible equipment
      2. telephone through use of modems
      3. can be used to assemble a report from several locations

   B. Teletypewriter Network

      1. TMX and Telex
      2. TWX transmits faster than Telex
      3. teleprinter exchange service of Western Union
      4. teletypist phones another teletypists at distant location
      5. once connection made, teletypists communicate by typing back and forth while the machines record their messages in writing
      6. economical way of sending international messages

   C. Mailgram

      1. Western Union service that combines telephone and U.S. mail
      2. message received during day stored in CPU of Western Unions computer for transmission during night
      3. mailgram inserted in window envelope
      4. dispatch by postal service next morning
      5. can be used in sending messages to customers, suppliers, and distributors not on TWX/Telex network

   D. Facsimile (also used as a form of reprographics)

      1. graphic communications
      2. sends original document from one location to a remote location where it is reproduced
      3. also referred to as "telecopiers"
      4. sends handwritten text and numbers, photographs, signatures, drawings, charts, graphs

E. Satellite

1. use of satellites to act as a nationwide computer
2. enable mail services to be channeled through the sky
3. earth stations beam radio waves
4. tremendous speed of transmission

F. Voice, store and forward systems

G. Teleconferencing

STORAGE/RETRIEVAL - PHASE V OF WP CYCLE

I. Records Management Systems

  A. Use of new automated filing equipment and supplies
  B. Alternative methods of traditional filing
  C. In addition to paper records it includes:

    1. magnetic media
    2. microfilm systems

II. Traditional Filing Systems

  A. Files

    1. vertical
    2. lateral/open shelf

  B. Systems

    1. centralized
    2. decentralized

  C. Kinds

    1. alphabetic
    2. numeric
    3. geographic
    4. subject
    5. soundex

III. Micrographics: The File of the Future

  A. What is it:

    1. reduction of document
    2. process places documents on microform
    3. saves 95% to 98% of space needed to share hard copy document

  B. Kinds of microforms

    1. microfiche
    2. microfilm
    3. aperature card
    4. microfilm jacket

  C. Microfilm

    1. keeps old records referred to infrequently
    2. kept in less spare than hard copy
    3. governmental agencies will accept microfilm in place of hard copy
    4. reduces filing time; can be scanned
    5. can't make margin notations
    6. reduces number of misfiled documents

D. Aperture Card

   1. has opening in which a strip or frame of microfilm is mounted
   2. indexing on paper portion of card

E. Microfilm Jacket

   1. folder consisting of clear material sealed together on two sides
   2. can store approximately 60 to 70 documents
   3. frames easily inserted at any time
   4. updating of files at any time

F. Microfiche

   1. sheet of film containing several hundred exposures
   2. used for publications or reports frequently referenced
   3. additions/deletions can easily be done

G. Optical Disk

   1. laser techonology
   2. thousands and thousands of storage pages

IV. Why records retention programs

   A. Determines how long documents should be stored on media
   B. Determines how long documents should be retained in a paper file
   C. Purging--process of eliminating unnecessary files
   D. Filing and retrieval constitute a great portion of paperwork costs

V. Storage of magnetic media

   A. By author's last name or author's initials
   B. Department

      1. sales
      2. accounting
      3. research and development

   C. Documents

      1. memos
      2. letters
      3. reports, etc.

   D. Index should be prepared and printed copy attached to media

WORK MEASUREMENT

I. Why

  A. Enables managers to recognize high and low work periods
  B. Evaluate production of employees

II. Daily Work Logs

  A. Kept by employee
  B. Overall production on weekly, monthly or yearly basis
  C. Work measured by

    1. line or
    2. document page or
    3. number of documents

III. Work Standards

  A. Provide basis for comparing production of employees
  B. Represent average amount of work expected per employee or per machine
  C. Many companies base weekly salaries on amount of work employees are able to produce
  D. Bonuses for work produced above average weekly quotas

IV. Production Reports

  A. Summaries of amount of work produced
  B. Play important role in control and supervision of the WP center
  C. Help supervisors balance workloads

TASK LIST
FOR
MEDICAL SECRETARY/
MEDICAL OFFICE ASSISTANT
HANDBOOK

A. RECEIVING, INTERVIEWING, AND INFORMING PEOPLE

1. Receive people using communication skills to determine nature of the visit.

2. Collect information using communication skills and/or appropriate forms to ensure completion of documents.

3. Answer questions using communication skills, resource materials, and/or knowledge of the organization to provide information.

4. Schedule appointments using communication skills and appointment calendar to arrange/cancel appointments and meetings.

5. Convey messages using oral and written communication skills to provide information.

6. Question originator using communication skills to determine task requirements of originator.

7. Escort people using inhouse procedures to designated areas for consultation with appropriate person.

B. PERFORMING TELEPHONE OPERATIONS

1. Receive calls using telephone system to provide information.

2. Place calls using telephone system to reach appropriate party.

C. PREPARING AND DISTRIBUTING MAIL

1. Process incoming mail using mechanical equipment or manual techniques to distribute the mail.

2. Process outgoing mail using mechanical equipment or manual techniques to prepare mail for delivery.

D. PERFORMING ACCOUNTING, BANKING, CREDIT AND PAYROLL FUNCTIONS

1. Receive cash using knowledge of monetary denominations to accept as payment for services rendered or payment on account.

2. Count cash using knowledge of monetary denominations to verify amount received.

D. PERFORMING ACCOUNTING, BANKING, CREDIT AND PAYROLL FUNCTIONS (cont)

3. Receive checks using knowledge of monetary denominations to accept as payment for services rendered or payment on account.
4. Accept credit card using knowledge or appropriate policies to receive as payment for services rendered or payment on account.
5. Issue receipt using appropriate forms and handwritten techniques or keyboard equipment to document amount received.
6. Deposit cash and checks using appropriate forms and written or verbal communication skills to entrust employer's money to bank for safekeeping.
7. Open/close accounts using written and verbal communication skills and appropriate forms to provide service.
8. Prepare statements/bills using appropriate forms and handwritten techniques or keyboard equipment to report amount due.
9. Control overdue accounts using handwritten techniques, keyboard equipment, or rubber stamp ro retrieve uncollected funds.
10. Process unredeemed/dishonored checks using appropriate data to reinstate funds.
11. Reconcile bank statements using appropriate forms to ensure proper balance.
12. Compile fee schedules using current parameters to provide necessary information.
13. Prepare checks using handwritten or mechanical techniques to pay amounts due.
14. Control petty cash fund using appropriate forms to maintain proper balance.
15. Prepare payroll using time sheets/time cards and record of pay rate to provide pay to employees.
16. Prepare tax reports using appropriate forms to comply with current tax legislation.

E. PREPARING DOCUMENTS, CORRESPONDENCE, AND REPORTS

1. Take dictation using shortahnd, speedwriting or stenotyping techniques and appropriate equipment to prepare documents.

2. Transcribe dictated material using appropriate equipment to prepare documents.

3. Compose correspondence using verbal or writing skills and appropriate forms to communicate information to correspondent.

4. Compose correspondence using verball or writing skills and appropriate forms to request information from correspondent.

5. Produce documents using composition skills and appropriate forms to communicate information.

6. Prepare worksheets using composition skills and appropriate forms to communicate information.

7. Gather data using reference materials and resources to compile document information.

8. Compile records using appropriate forms, reference materials, resources, and composition skills to provide information.

9. Type information using typing equipment and appropriate forms to prepare letters, labels, documents, forms, or statistical reports.

10. Format information using forms to prepare letters, labels, documents, forms, or statistical reports.

11. Proofread documents using visual and written communication skills to verify accuracy and completeness.

12. Arrange data using established guidelines to organize information in tabular form.

13. Categorize data using established guidelines to classify information.

14. Prioritize jobs using priority schedules to produce documents on a timely basis.

15. Record information using appropriate equipment or manual techniques to update records.

F. MAINTAINING FILES, RECORDS, AND LOGS

1. Maintain records using knowledge of records management procedures to manage information.

G. DUPLICATING AND ASSEMBLING DOCUMENTS

1. Copy data using equipment or manual techniques to transfer data from one document to another.

2. Duplicate documents using appropriate equipment to reproduce information.

3. Photograph documents using microfilming device to reproduce documents on microfilm.

4. Collate documents using mechanical equipment or manual techniques to assemble documents in sequence.

5. Bind documents using appropriate equipment or manual techniques to fasten documents.

H. PERFORMING WORD PROCESSING

1. Load software using appropriate commands to access software functions.

2. Input information using keyboard to record documents.

3. Input information using keyboard to store documents.

4. Enter stored media using keyboard commands to retrieve/recall text.

5. Enter stored media using keyboard commands to communicate information.

6. Enter stored media using keyboard to revise text.

7. Enter instructions using keyboard commands to print documents.

8. Originate forms using word processing software/hardware to meet requester's needs.

9. Program document format using word processing software/hardware to develop a new printed document.

10. Program forms using word processing programmed software/hardware to fill in pre-printed forms.

11. Process management records using word processing software/hardware to generate data/information.

12. Locate information using reference materials to process a document.

H. PERFORMING WORD PROCESSING (cont)

13. Retrieve information using a programmed software package to obtain key information.

14. Select blocks of information using text editing techniques to prepare a new printed document.

15. Assemble information from any media using keyboard techniques to create a new printed document.

16. Sort information using programmed software to select fields of information according to pre-defined criteria and knowledge of word processing procedures, to create a new printed document.

17. Manipulate files using keyboard commands to merge stored information from any file(s) into another file.

18. Perform mathematical calculations using keyboard and programmed software to verify document information.

19. Perform media maintenance routines using knowledge of system operations to maintain file media.

I. MAINTAINING INVENTORY

1. Maintain stock using inventory control forms to ensure adequate inventory levels.

J. MAINTAINING MACHINES AND OFFICE EQUIPMENT

1. Analyze equipment malfunction using a knowledge of system operations to identify cause of malfunction.

2. Perform equipment maintenance functions using appropriate materials to maintain systems operating.

3. Repair equipment using appropriate tools to correct malfunction.

4. Schedule equipment maintenance using appropriate service to repair malfunctions.

K. PERFORMING MEDICAL SPECIALTIES

1. Maintain medical office library using appropriate documents to provide appropriate reference materials.

2. Process out-of-office studies using appropriate procedures to maintain patient records.

3. Complete medical forms using appropriate information to provide data.

4. Prepare medical reports using appropriate information to provide data.

L. SUPERVISING AND TRAINING

1. Interview applicants using appropriate forms to ascertain employability.
2. Maintain personnel records using appropriate forms to ensure accurate data.
3. Maintain policy/procedures manual using appropriate information to establish operating guidelines.
4. Orient new employees using training materials to familiarize employees with procedures and equipment.
5. Establish employee performance measurements using appropriate guidelines to ensure production schedules are met.
6. Establish staffing patterns and schedule staff using knowledge of production needs.
7. Schedule work assignments using knowledge or priorities to complete task.

M. PERFORMING CLINICAL TASKS

1. Perform aseptic handwashing techniques using appropriate materials to clean hands.
2. Open a sterile tray cover and remove sterile barrier.
3. Disinfect instruments (chemical).
4. Clean and restock examination room.
5. Wrap instruments for sterilization.
6. Unwrap or open sterile packages and maintain sterility of the contents.
7. Sterilize supplies using the dry heat method.
8. Sanitize instruments.
9. Sterilize supplies and instruments using the autoclave (moist heat with pressure method).
10. Pour a sterile solution.
11. Apply sterile gloves.
12. Using sterile transfer forceps.

M. PERFORMING CLINCAL TASKS (cont)

13. Support an ambulating client using a knowledge of proper body mechanics and appropriate equipment to maintain physical safety of self and client.

14. Pull a client to a standing position using a knowledge of proper body mechanics and appropriate equipment to maintain the physical safety of self and client.

15. Operate a wheelchair using a knowledge of physics and the equipment and proper body mechanics to transport a client from one location to another.

16. Administer spirits of ammonia using an available source to revive a faint client.

17. Position a faint client using a knowledge of the nervous and cardiovascular systems to revive the client's full consciousness.

18. Treat a burn using appropriate materials and a knowledge of the integumentary systems and surgical aseptic technique to prevent further trauma and infection.

19. Perform cardiopulmonary resuscitation using available resources and models to practice reviving a client in respiratory and/or cardiac arrest.

20. Apply direct pressure to a wound using appropriate resources to control blood flow from a wound.

21. Apply direct pressure to a pressure point using appropriate resources and a knowledge of the anatomical location of strategic arteries to control blood flow from a wound.

22. Apply bandages using appropriate materials to prevent further trauma to an injured area.

23. Apply roller bandages- hand, whole leg (ankle, lower leg, knee, thigh), finger, head, eye.

24. Apply tubular bandage.

25. Assist a physician using appropriate equipment and a knowledge of different positions to perform routine physical examinations maintaining the comfort, privacy, and safety of the client.

26. Perform routine biochemical tests under a supervisor's order using appropriate dipsticks, tapes, and/or tablets to test a urine specimen.

M. PERFORMING CLINICAL TASKS (cont)

27. Perform specific gravity.
28. Collect a specimen of body discharge using a knowledge of asepsis and the digestive, urinary, and respiratory systems and appropriate equipment to obtain an ordered specimen for diagnostic testing.
29. Label a specimen from a client using appropriate materials to identify the specimen.
30. Measure body weight using a scale to obtain data.
31. Measure body height using an appropriate measuring device to obtain data.
32. Assess a radial, brachial, carotid, femoral and/or pedal artery pulse using appropriate timing device and knowledge of the cardiovascular system to determine the rate, rhythm, and force of client's pulse.
33. Measure a temperature using an appropriate measuring device to determine a client's body heat.
34. Assess respirations using an appropriate timing device to determine the rate, rhythm, and depth.
35. Measure blood pressure using appropriate equipment to determine systolic and diastolic readings.
36. Perform E.K.G./E.C.G. test.
37. Mount E.K.G./E.C.G. graphs.
38. Clean E.K.G. equipment after use.
39. Assist with a papaniculous smear.
40. Preparation of slide for differential count.
41. Perform white blood count.
42. Perform red blood count.
43. Use the microscope.
44. Prepare urine for microscopic examination.
45. Obtain a capillary blood specimen.
46. Perform hematocrit test (microhematocrit method).

M. PERFORMING CLINICAL TASKS

47. Perform venipuncture (syringe method).
48. Perform venipuncture (vacuum method).
49. Drape patient.
50. Test visual acuity.
51. Prepare for catheterization.
52. Prepare patient for minor surgery.
53. Prepare room for minor surgery.
54. Assist doctor with minor surgery.
55. Assist with proctoscopic examination.
56. Assist physician with dressing change.
57. Changing a sterile dressing.
58. Perform eye instillation.
59. Perform ear instillation.
60. Administering parenteral injections, intramuscular injection, and sub-q (hypodermic) indradermal injection.
61. Administer oral medication.

Duty: Receiving, Interviewing, and Informing People

Duty No. A

Task No. 1

Task: Receive people using communication skills to determine the nature of the visit.

Achievement Indicators: The learner:

	Yes	No
1. Greeted patient or visitor by name if possible -	____	____
2. Expressed verbal welcome to patient/visitor and anyone accompanying them -	____	____
3. Requested purpose of visit from patient/visitor -	____	____
4. Handled each visitor's or patient's requests courteously and professionally -	____	____
5. Maintained office policy regarding visitor/patient -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:	**Resources:**
reception area	See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Review receiving people, if appropriate. 2. Demonstrate: a. correct way to receive people b. incorrect way to receive people 3. Discuss feelings/results of actions above. 4. Explain why this is an important communication task. 5. Show film or slide/tape presentation on how to receive people, if available. 6. Role-play a correct way to receive people. 7. Assign practice activities. 8. Administer a post-test having students performing task, if appropriate.	1. Take pretest, if appropriate. 2. Observe demonstration on how to receive people. 3. Participate in discussion on feelings/results of actions above. 4. Observe film or slide/tape presentation on how to receive people. 5. Participate in role-playing activities on how to receive people. 6. Complete assigned practice activities. 7. Complete post-test, if appropriate.

Duty: Receiving, Interviewing, and Informing People	**Duty No.** A **Task No.** 2

Task: Collect information using communication skills and/or appropriate forms to ensure completion of documents.

Achievement Indicators: The learner:

	Yes	No
1. Gathered appropriate forms and references -	____	____
2. Requested basic information necessary to complete forms from requester -	____	____
3. Made inquiries tactfully to obtain other information necessary to complete documents -	____	____
4. Obtained necessary signatures -	____	____
5. Confirmed information to assure mutual understanding -	____	____
6. Expressed appreciation upon receipt of information -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to requester's requirements and knowledge of communication skills.

Tools and Equipment:	**Resources:**
reception area; forms necessary to collect information	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review use of selected document/form to be used to gather information.	1. Learn how to correctly select and use appropriate document/form for collecting information.
2. Review proper methods and techniques for tactfully requesting necessary information for document/form.	2. Learn proper techniques for requesting necessary information for document/form.
3. Explain importance of communication skills in performing this activity.	3. Use correct communication skills to collect information, obtain necessary signature(s) and express appreciation upon receipt of these.
4. Discuss and/or demonstrate proper procedure for obtaining signature(s) for document/form.	4. Participate in role-play activities, if appropriate.
5. Discuss and/or demonstrate how to correctly verify information collected and express appreciation upon receipt of correct information.	
6. Role-play to practice this activity if appropriate.	

Duty: Receiving, Interviewing, and Informing People

Duty No. A

Task No. 3

Task: Answer questions using communication skills, resource materials, and/or knowledge of the organization to provide information.

Achievement Indicators: The learner:	Yes	No
1. Listened attentively to request or question -	____	____
2. Gathered any files, references, or information needed to answer questions -	____	____
3. Formulated answer to question/request exercising use of business ethics -	____	____
4. Answered question/request effectively either verbally or in writing -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards and knowledge of proper communication skills.

Tools and Equipment:	**Resources:**
reception area	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review listening skills.	1. Learn appropriate listening skills.
2. Go over how to determine what files, references, or information are necessary to properly answer questions/requests.	2. Learn proper ways to determine information references, and files needed to answer request(s)/question(s) correctly.
3. Discuss how to formulate answer to questions/requests using business ethics.	3. Participate in discussion of how to properly formulate answers to questions/requests.
4. Assign activities (written or oral) which require questions/requests be answered according to proper business ethics.	4. Complete assigned activities on answering questions/requests according to proper business ethics.

Duty: Receiving, Interviewing, and Informing People

Duty No. A

Task No. 4

Task: Schedule appointments using communication skills and appointment calendar to arrange/cancel appointments and meetings.

Achievement Indicators:

The learner:	Yes	No
1. Gathered demographic information concerning appointment to be made: date, time, place, person's name(s) involved, telephone number, purpose -	____	____
2. Determined employer's schedule and checked for conflicting appointments -	____	____
3. Determined appropriate time period for type of service to be rendered (if appropriate) -	____	____
4. Recorded patient's name on appointment book/calendar on appropriate date and at proper time -	____	____
or		
5. Recorded meeting/appointment date and time on appointment book/calendar for employer -	____	____
6. Recorded purpose of appointment/meeting -	____	____
7. Reminded employer/appropriate person of appointment/meeting -	____	____
or		
8. Gave employer/appropriate person copy of the day's appointments -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:

typewriter, if appropriate; reception area; appointment calendar/book; schedule of fees and services

Resources:

See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Review communications skills necessary for gathering information necessary to arrange, change or cancel an appointment or meeting. 2. Demonstrate how to determine appropriate date and time for appointment or meeting. 3. Demonstrate proper technique for recording necessary information on appointment book/calendar to schedule appointment or meeting on proper date, at correct time, and for correct time period. 4. Impress upon student importance of reminding employer/appropriate person of appointment/meeting or giving him/her a copy of day's appointments. 5. Assign practice exercises for gathering demographic information determining possible conflicts, and recording (scheduling) appointment/meeting on appointment book/calendar.	1. Learn skills necessary for gathering name, date, time, place, phone number, purpose (demographic information) for scheduling appointment or meeting. 2. Observe demonstrations of how to determine appropriate date and time and record necessary information on appointment book/calendar correctly. 3. Complete assigned exercises on gathering demographic information, checking for conflicts, recording demographic information correctly on appointment book/calendar and reminding employer (or giving him/her copy) of appointment or meeting.

Duty: Receiving, Interviewing, and Informing People

Duty No. A

Task No. 5

Task: Convey messages using oral and written communication skills to provide information.

Achievement Indicators: The learner:

	Yes	No
1. Gathered information to compose message to be conveyed -	____	____
2. Composed the message using correct grammar, spelling, punctuation, etc. -	____	____
3. Checked message for completeness -	____	____
4. Conveyed message orally directly to person(s) it is intended for, either face-to-face or by telephone -	____	____
or		
5. Conveyed typed or neatly and correctly handwritten message in person or by mail -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:

message pad or form; writing utencils

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Review how to gather necessary information and compose a message using correct grammer, punctuation, and spelling.	1. Learn how to gather information and compose messages using correct grammar, punctuation, and spelling.
2. Discuss importance of verifying message for completeness.	2. Learn the importance of verifying messages for completeness.
3. Demonstrate proper techniques for conveying message orally face-to-face or by telephone.	3. Observe demonstration of proper technique for conveying message either orally face-to-face or by telephone.
4. Demonstrate proper technique for typing or handwriting message to be conveyed in person or by mail	4. Observe demonstration of proper techniques for typing or handwriting message to be conveyed.
5. Assign message composition activity.	5. Complete assigned activities on composing messages.
6. Role-play conveying composed message(s) if appropriate.	6. Participate in role-playing activities for conveying messages, if appropriate.

Duty:	Receiving, Interviewing, and Informing People	**Duty No.**	A
		Task No.	6

Task: Question originator using communication skills to determine task requirements of originator.

Achievement Indicators: The learner:	Yes	No
1. Determined task needing to be clarified or completed -	____	____
2. Formulated questions to be asked which would aid in clarifying or completing the task -	____	____
3. Located originator of the task -	____	____
4. Asked questions of the originator -	____	____
5. Confirmed information to assure mutual understanding -	____	____
6. Expressed appreciation upon conclusion of session -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to knowledge of professional courtesy and proper communication skills.

Tools and Equipment:	**Resources:**
reception area	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review communications skills necessary to determine originator's purpose/requirements for any given task.	1. Learn communications skills necessary to determine originator's purpose/requirements for task to be completed.
2. Review skills necessary to formulate intelligent questions to get information necessary to complete task properly for originator.	2. Learn how to formulate intelligent questions to get necessary information for completion of task.
3. Impress upon students importance of carefully questioning originator about task, confirming information received from originator, and expressing appreciation upon conclusion of session.	3. Participate in role-playing, if appropriate, or complete assignment(s) using correct techniques and methods for questioning originator, verifying information received, and expressing appreciation for information received regarding purpose or requirements for task(s).
4. Role-play or make assignment to practice formulating and asking questions of originator to determine purpose or requirements for tasks to be completed.	

Duty: Receiving, Interviewing, and Informing People

Duty No. A

Task No. 7

Task: Escort people using inhouse procedures to designated areas for consultation with appropriate person.

Achievement Indicators: The learner:

	Yes	No
1. Determined location of appropriate area for consultation -	____	____
2. Asked patient or visitor to follow to the appropriate area -	____	____
3. Made person comfortable and at ease before leaving the room -	____	____
4. Assured person that consultation would begin shortly -	____	____
5. Informed consultant/doctor that the patient/visitor was waiting in the designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to set procedures and knowledge of the organization.

Tools and Equipment:

reception area and/or consultation area

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a problem-solving case. Ask students to evaluate it: a. how did the receptionist respond? b. how might the visitor have felt? c. how could this affect the physician's practice. You may want to ask students to write their responses, as well as give oral answers. Ask for any experiences they have had in either escorting people or in being escorted by someone. 2. Tell why the task of escorting people/patients to a designated area is an important communication skill. 3. List the steps for escorting visitors and patients to designated areas for consultation with the appropriate person. 4. Demonstrate the steps for escorting patients and visitors to designated area (use a student). 5. Assisgn role-playing exercises using pairs of students, to demonstrate proper procedures for escorting patients to designated areas. 6. Restate why this task is an important communication skill; tell how it fits with the other job requirements. 7. May want to give a post-test.	1. Observe demonstration of how to escort patient/visitor to designated area. 2. Participate in role-playing assignment on escorting.

Duty:	Performing Telephone Operations	**Duty No.**	B
		Task No.	1
Task:	Receive calls using telephone system to provide information.		

Achievement Indicators: The learner:

		Yes	No
1.	Placed pad and pencil by the telephone -	____	____
2.	Answered telephone promptly and pleasantly -	____	____
3.	Answered telephone by identifying employer's name or employer's office name followed by employee's name -	____	____
4.	Used pleasant voice and proper diction to handle call -	____	____
5.	Determined caller's name, party being called, purpose of call, and message (if appropriate) -	____	____
6.	Gave out only necessary information -- remembered confidentiality -	____	____
7.	Did not keep person on hold for a long time if another call came in -	____	____
8.	Verified information received especially if it was difficult to understand -	____	____
9.	Repeated information the caller gave, especially if it contained names or numbers -	____	____
10.	Recorded call on telephone log (if appropriate) -	____	____
11.	Recorded information or message on telephone message form (if appropriate) -	____	____
12.	Located called party or distributed messages -	____	____

Criteria:	Competence in the task will be recognized when the procedure is performed according to prescribed procedures and when there is knowledge of equipment.

Tools and Equipment:	**Resources:**
telephones; message forms; telephone log; optional - switchboard; slide/cassette player; tape recorder	See bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture/discussion on this task which may include: a. create the transition from past telephone experiences to present. b. determine students' previous background. c. introduce task as it relates to medical office. 2. Assign resources and references. 3. Show audio-visual materials. 4. Demonstrate correct procedure for "Receiving Telephone Calls." 5. Assign teams to role-play "Receiving Telephone Calls." 6. Listen to students in their role-playing situations. 7. Arrange for students to visit switchboard to operate or to observe its operation (optional). 8. Arrange for students to answer the telephones in the school's office (optional). 9. Summarize tasks covered in lesson.	1. Attend lecture. 2. Read assigned resources and references for this task. 3. View the audio-visual materials on this task. 4. Observe demonstration by teacher. 5. Complete role-playing situations which may include: a. take a message b. locate party called c. place on hold d. break a hold e. provide information f. determine name of caller (medical situation) g. medical emergencies h. message taking i. appointments j. questions about test results k. patient progress reports l. cancellations m. inquiries about patients n. calls for physicians o. calls for prescriptions 6. (optional) Visit switchboard to operate and/or observe. 7. (optional) Answer telephone in school's offices.

Duty: Performing Telephone Operations

Duty No. B

Task No. 2

Task: Place calls using telephone system to reach appropriate party.

Achievement Indicators: The learner:	Yes	No
1. Gathered appropriate supplies, references, and information needed to complete the call -	____	____
2. Determined telephone number to be called, using personal or telephone directory (if appropriate) -	____	____
3. Determined method to be used to place the call (local, long distance, charge card, etc.) -	____	____
4. Determined local time at destination of call (if appropriate) -	____	____
5. Planned the conversation before placing the call -	____	____
6. Placed the call -	____	____
7. Prepared to leave a message if party called was not in or an answering service or recording was reached -	____	____
8. Kept a record of long distance calls (if appropriate) -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and a demonstrated knowledge of telephone equipment.

Tools and Equipment:
telephones; cards for rotary cards file; telephone directories; telephone answering machine (optional); slide/cassette projector; tape recorder

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture/discussion on this task which may include: a. create the transition from past telephone experiences to present. b. determine students' previous background. c. introduce task as it relates to medical office. d. review the use of the telephone directories. e. Explain how to type telephone/address cards for rotary card file. 2. Assign resources and references. 3. Show audio-visual materials. 4. Demonstrate correct procedure for "Placing Telephone Calls." 5. Assign teams to role-play "Placing Telephone Calls." 6. Listen to students in their role-playing situations. 7. Demonstrate how to use and record on a "Telephone Answering Machine." 8. Assign additional tasks which may include: a. record and operate on a "Telephone Answering Machine." b. type cards for a telephone/address rotary card file. c. look up phone numbers in telephone directories. 9. Summarize tasks covered in lesson.	1. Attend lecture. 2. Read assigned resources and references for this task. 3. View this audio-visual materials on this task. 4. Observe demonstrations by teacher. 5. Complete role-playing situations which may include: a. call a patient for a doctor b. call long distance c. use a WATS line d. place a charge call e. call hospital lab f. call operating room g. call for referral for specialist h. make travel plans for the doctor i. call pharmaceutical j. call for maintenance on equipment. 6. Record message for telephone answering machine. 7. Type cards for address/telephone rotary card file. 8. Find phone numbers in the phone directories which may include: a. medical practice numbers b. office administration numbers c. doctor's personal telephone numbers

Duty:	Preparing and Distributing Mail	**Duty No.**	C
		Task No.	1

Task: Process incoming mail using mechanical equipment or manual techniques to distribute the mail.

Achievement Indicators: The learner:

	Yes	No
1. Had any necessary supplies available for processing mail (letter opener, date stamp, stapler, pencil) -		
2. Recorded incoming mail on mail log or mail register (if appropriate) -		
3. Sorted mail into categories (correspondence, bills and statements, advertisements, periodicals and professional circulars, samples, etc.) -		
4. Delivered personal mail and anything that looked very important directly to employer's desk or delivered mail to department and/or other person(s) if job tasks did not include opening mail) -		
5. Opened each piece of mail either manually or mechanically and emptied its contents -		
6. Checked to see if sender's address was on contents; if not, copied it onto contents before discarding envelope -		
7. Attached any enclosures to letter with paper clip or staple or wrote note on letter if enclosures were missing -		
8. Dated correspondence at top with date and/or time of receipt -		
9. Recorded all checks and bills on log (if appropriate) -		
10. Annotated correspondence (if appropriate) -		
11. Located and attached any necessary correspondence or files before giving mail to employer and attached routing slips or made copies, if necessary -		
12. Placed correspondence requiring follow-up in follow-up folder (if appropriate) or made note on desk file or tickler calendar-		

	Yes	No
13. Made a separate stack of mail to be handled by secretary (if appropriate)-	____	____
14. Selected any other mail that employer must handle and put on his/her desk for processing -	____	____
15. Placed periodicals and journals in appropriate designated areas (if appropriate) -	____	____
16. Discarded any mail which did not need to be processed and which they knew the employer would not wish to see -	____	____
17. Placed mail in labeled folders if employer was away for several days -	____	____
18. Forwarded mail (if appropriate) -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:
letter opener; date stamp; stapler; pencil; mail log or register; paper clips; junk mail; routing slips; folders; assorted letters and magazines; audio-visual equipment

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture/discussion on this task which may include: a. create the transition from receiving personal mail to processing incoming mail in a medical office. b. determine students' previous background. c. introduce task as it relates to a medical office. d. explain how to handle incoming mail. 2. Assign resources and references. 3. Show audio-visual material. 4. Demonstrate correct procedure for opening mail with letter opener. 5. *Assemble junk mail (that is not opened), magazines, letters, etc. 6. Assign simulated task of processing mail. 7. Optional - arrange for student to help sort mail in one of the school's offices. 8. Summarize tasks covered. *Save your junk mail - then students can use letter opener.	1. Attend lectures on processing incoming mail. 2. Read assigned references and resources for mail handling. 3. View the audio-visual materials on mail handling. 4. Observe demonstration by teacher on correct procedure for opening mail. 5. Complete simulated project involving opening and distributing mail, including completion of mail register. Some of the mail may include: a. doctor's personal mail b. payments for fees c. lab reports and medical reports d. new drugs on the market e. samples f. junk mail g. medical publications h. educational workshops 6. Optional - help sort mail in one of the school's offices.

Duty: Preparing and Distributing Mail

Duty No. C

Task No. 2

Task: Process outgoing mail using mechanical equipment or manual techniques to prepare mail for delivery.

Achievement Indicators: The learner:	Yes	No
1. Assembled equipment and supplies necessary to process outgoing mail (typewriter, envelopes, postage scale, postage meter, etc.) -	____	____
2. Acquired knowledge of various mail classifications and Postal Services in order to determine most expedient method of dispatching outgoing mail -	____	____
3. Checked correspondence for appropriate signature(s) -	____	____
4. Addressed envelope appropriately (using new P.O. style -- all caps, no punctuation) -	____	____
5. Used zip code directory (when necessary) -	____	____
6. Folded and inserted correspondence -- checked to be sure right letter went in appropriate size envelope -	____	____
7. Checked to be sure enclosures or attachments were included -	____	____
8. Sealed envelope securely - manually or automatically -	____	____
9. Weighed and determined correct postage (if necessary) -	____	____
10. Affixed correct postage and any other Postage Service labels necessary - kept postage meter record, if appropriate -	____	____
11. Dispatched or routed mail in appropriate manner -	____	____
12. Processed package (if appropriate) -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures and U.S. Postal Regulations.

Tools and Equipment: zip code directory; postal scale; postage meter; various supplies for mailing letters and packages; audio-visual equipment	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture/discussion on handling outgoing mail which may include: a. create the transition from mailing personal mail to processing mail in the medical office. b. determine students' previous background. c. introduce task as it relates to the medical office. d. review may include: (1) typing envelopes (2) using the zip code directory	1. Attend lecture on processing outgoing mail.
2. Assign resources and references on processing outgoing mail.	2. Read assigned resources and references for handling outgoing mail.
3. Show audio-visual materials on handling outgoing mail.	3. View the audio-visual materials on processing outgoing mail.
4. Demonstrate how to wrap a package.	4. Observe demonstration by the teacher on how to wrap a package.
5. Assemble various sized envelopes and contents.	5. Complete the simulation of processing outgoing mail which may include: a. typing envelopes b. using the zip code directory c. using varied sized envelopes and packages (No. 6 3/4, No. 10, Kraft, etc.). d. using various postal rates (special delivery, special handling, registered, certified, insured, COD, regular mail, etc.)
6. Assign the task of processing outgoing mail and this task may include: a. typing envelopes b. using the zip code directory	6. Help process outgoing mail in the school's office - optional.
7. Arrange for students to help process outgoing mail in the school office - optional.	

Duty: Performing Accounting, Banking, Credit and Payroll Functions

Duty No. D

Task No. 1

Task: Receive cash using knowledge of monetary denominations to accept as payment for services rendered or payment on account.

Achievement Indicators: The learner:

	Yes	No
1. Determined amount to be collected -	____	____
2. Accepted cash graciously for payment on account or for services rendered -	____	____
3. Placed cash and coins in cash box or cash register -	____	____
4. Recorded amount received on receipt and/or ledger -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:
pegboard system (optional); patient ledger card(s); receipt(s); pen; correction material; overhead projector; cash box or register; chart

Resources:
See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Ask the following question: a. do students recognize money denominations? 2. Find out students' background prior to beginning of task. 3. Tell what is to be taught and why it is important. 4. Using an overhead/chart, demonstrate how to: a. retrieve patient ledger b. accept cash graciously c. record monies on ledger d. place monies in cash box e. record amount received on ledger 5. Have students practice the skill they have learned on receiving cash. 6. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills or products.	1. Observe demonstration. 2. Retrieve patient ledger and determine amount to be collected. 3. Accept cash graciously. 4. Place monies in cash box. 5. Post amount received on ledger.

Duty: Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.** D **Task No.** 2

Task: Count cash using knowledge of monetary denominations to verify amount received.

Achievement Indicators: The learner:	Yes	No
1. Arranged cash in denominations, separating checks -	____	____
2. Counted cash received -	____	____
3. Totaled checks -	____	____
4. Calculated total cash and checks received -	____	____
5. Verified calculated amount with amount to be received -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
pegboard system; patient ledger card(s); receipt(s); correction materials; paper money denominations; overhead projector	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following questions: a. do students recognize correctly filled out checks? b. find out student's background regarding personal checks and cash. 2. Tell what is to be taught and why it is important. What experiences have aided their knowledge toward verifying monies received. 3. Demonstrating separating cash/checks. 4. Show transparency and explain from transparency how columns are totaled (cash/check columns) and how to verify totals on record. 5. Summarize for students what has been learned: a. how it fits into the total job description b. how it fits with other job tasks on skills c. how it can be transferred to other skills or products. 6. Have the students practice the skills they have learned in counting cash and checks and verifying amounts.	1. Observe demonstration and transparencies. 2. Review money denominations. 3. Separate cash/checks. 4. Record cash/checks received in correct columns. 5. Total cash column. 6. Total check column. 7. Verify totals.

Duty: Performing Accounting, Banking, Credit and Payroll Functions

Duty No. D

Task No. 3

Task: Receive checks using knowledge of monetary denominations to accept as payment for services rendered or payment on account.

Achievement Indicators: The learner:

	Yes	No
1. Determined amount to be collected -	____	____
2. Accepted check graciously for payment on account or for services rendered -	____	____
3. Verified correctness of check -	____	____
4. Requested identification (if appropriate) -	____	____
5. Placed check in cash box or cash register -	____	____
6. Recorded amount received on receipt (if appropriate) and/or ledger -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:
a pegboard system; patient ledger card(s); receipt; pen; correction material; cash box or register; sample checks; overhead projector

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following questions: a. do students recognize incorrectly written checks. b. find out student's background regarding check writing and precautions to observe when accepting checks. 2. Tell what is to be taught and why it is important. 3. Demonstrate how to properly accept checks. 4. Using an overhead projector and using a sample check, present the precautions that should be observed when accepting checks and how to require ID and record check amount on patient ledger. 5. Summarize for students has been learned: a. how it fits into the total job description. b. how it fits with other job tasks on skills. c. how it can be transferred to other skills or products.	1. Observe demonstration and/or transparency on how to handle checks. 2. Determine amount to be collected from patient ledger. 3. Accept cash/check graciously. 4. Verify correctness of check. 5. Request ID if necessary. 6. Place monies in cash box or register. 7. Record amount received on ledger card.

Duty: Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.** D **Task No.** 4

Task: Accept credit card using knowledge or appropriate policies to receive as payment for services rendered or payment on account.

Achievement Indicators: The learner:

	Yes	No
1. Determined amount to be collected -	____	____
2. Accepted credit card graciously for payment on account or for services rendered -	____	____
3. Checked validity of card (identification, expiration, date, signature, if appropriate) -	____	____
4. Completed transaction form -	____	____
5. Recorded amount received on receipt (if appropriate) and/or ledger -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
pegboard system; ledger card; receipt; pen; correction material	See Bibliography.

Teacher Activities

1. Ask the following questions:
   a. have they used a credit card themselves?
   b. is there anyone who has not seen a credit card?
2. Find out student's background regarding credit card uses.
3. Tell what is to taught and why it is important.
4. List steps needed for acceptance and verification of credit cards.
5. Have students practice the skill they have learned.
6. Summarize for students what has been learned:
   a. how it fits into the total job description.
   b. how it fits with other job skills.
   c. how it can be transferred to other skills or products.

Student Learning Activities

1. Study list of steps needed for acceptance and verification of credit cards.
2. Look at charge cards and identify the validity of card by:
   a. identification
   b. expiration date
   c. signature
   d. list of bad cards circulating (if appropriate)
3. Use charge machine with proper form (or appropriate apparatus) to fill out a charge credit card slip. Get patient's signature and in some cases the driver's license number is necessary.
4. Record charge amount on day sheet patient ledger and give proper receipt to the patient.

Duty: Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.** D **Task No.** 5

Task: Issue receipt using appropriate forms and handwritten techniques or keyboard equipment to document amount received.

Achievement Indicators: The learner:	Yes	No
1. Determined and verified the amount received by cash or check -	____	____
2. Recorded amount received and any other appropriate information on receipt, using handwritten technique (pegboard -- write-it-once system) or any other mechanical technique or method -	____	____
3. Issued customer's copy of receipt to person paying the amount -	____	____
4. Filed the carbon copy to be processed later as necessary -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
any pegboard system; patient ledger sheet(s); day sheet(s); receipt(s); autographic register or other receipt machine	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many have received written receipts for purchases/services? 2. Find out student's background regarding writing/typing receipts. 3. Tell what is to be taught and why it is important. 4. Using an overhead projector, present how amount is recorded on receipt using pegboard method and/or written techniques. 5. Have student practice the skill they have learned. 6. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. Observe overhead presentation on preparing receipts. 2. Determine amount and verify amount received by cash/check. 3. Record amount received and other appropriate information onto the pegboard system/handwritten receipt. 4. Issue to customers their copy of receipt. 5. File the carbon copy for later use.

Duty: Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.** D **Task No.** 6

Task: Deposit cash and checks using appropriate forms and written or verbal communication skills to entrust employer's money to bank for safekeeping.

Achievement Indicators: The learner:

		Yes	No
1.	Counted and verified amount to be deposited in bank -	_____	_____
2.	Separated cash and checks -	_____	_____
3.	Checked endorsement(s) on checks -	_____	_____
4.	Recorded amount of cash and currency on deposit ticket -	_____	_____
5.	Recorded amount of each check on deposit ticket (Also ABA number if appropriate) -	_____	_____
6.	Totaled and recorded total on proper line -	_____	_____
7.	Verified correctness of amount on deposit slip by checking against daily journal or register tape for that day's receipts -	_____	_____
8.	Entered amount of deposit on first unused check stub in checkbook or checkbook register -	_____	_____
9.	Entered name and address of employer or company on top of deposit ticket, if not pre-printed -	_____	_____
10.	Transported deposit to bank and completed transaction -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
pegboard system; deposit ticket(s); checkstub; overhead projector	See Bibliography.

Teacher Activities

1. Ask the following question:
   a. how many have completed a bank deposit slip?
2. Find out student's background regarding bank deposit slips.
3. Tell what is to be taught and why it is important.
4. Using an overhead projector show the steps needed to make out and verify a bank deposit slip.
5. Have students practice the skill they have learned on making out and verifying a deposit slip.
6. Summarize for students what has been learned:
   a. how it fits into the total job description.
   b. how it fits with other job tasks or skills.
   c. how it can be transferred to other skills.

Student Learning Activities

1. Observe the presentation on how to make out and verify a deposit slip.
2. Use a bank deposit slip and list the days receipts -- cash/checks on a deposit slip by:
   a. counting and verifying amount to be deposited
   b. separating cash/check
   c. checking endosements on checks.
   d. recording cash and currency on deposit slip.
   e. totaling deposit slip.
   f. verifying amount by checking daily journal/sheet.
   g. entering amount of deposit on first unused check stub/checkbook register.
   h. entering name of employer on deposit slip.
   i. transporting bank deposit slip to bank.

Duty: Performing Accounting, Banking, Credit and Payroll Functions

Duty No. D

Task No. 7

Task: Open/close accounts using written and verbal communication skills and appropriate forms to provide service.

Achievement Indicators: The learner:

	Yes	No
1. Selected appropriate account form to open patient account (generally patient ledger used in write-it-once system) -	____	____
2. Recorded patient's name and address on top of account form or in appropriate position on form -	____	____
3. Assigned appropriate account number if necessary -	____	____
4. Determined and recorded amount of charge in proper column -	____	____
5. Determined and recorded balance due in proper column -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:
pegboard system; patient account ledger card(s); overhead projector

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many students have opened a patient account? Are they familiar with a patient ledger card? 2. Find out student's background prior to beginning of task. 3. Tell what is to be taught and why it is important. 4. Ask students what past experiences have aided their knowledge toward opening a student account. 5. Using an overhead projector, present patient ledger card and the steps in opening an account (or closing, if appropriate) on a ledger card. 6. Have students practice the skill they have learned. 7. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. Observe presentation on how to open and/or close a patient account. 2. Select a ledger card to open a patient's new account and: a. record patient's name and address on top of accounting form. b. assign appropriate account/ patient number (if necessary). c. determine and record amount of charge in proper column. d. determine and record balance in proper column. e. close account, if appropriate.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D **Task No.** 8

Task: Prepare statements/bills using appropriate forms and handwritten techniques or keyboard equipment to report amount due.

Achievement Indicators: The learner:	Yes	No
1. Selected appropriate billing form or statement -	____	____
2. Determined amounts to be entered on statement form for the billing period (usually 1 month) using the patient ledger -	____	____
3. Recorded transaction number, date of transaction, description or code of service rendered, charge or payment and balance due -	____	____
4. Distributed copies to appropriate destination/ individual -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
pegboard system; appropriate forms; overhead projector	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many have prepared a billing statement? 2. Find out student's background prior to beginning of task. 3. Ask how many have prepared a billing? 4. Tell what is to be taught and why it is important. 5. Using an overhead projector, show the students how to prepare a monthly billing (statements). 6. Have the students use patient ledger cards and prepare monthly billing. 7. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. Observe the presentation on preparing monthly statements. 2. Select the patient ledger card(s) and prepare statement(s) by: a. recording date b. recording transaction and description or code of services rendered c. recording charge/payments and balance due 3. Distribute statements (mail).

Duty: Performing Accounting, Banking, Credit and Payroll Functions

Duty No. D

Task No. 9

Task: Control overdue accounts using handwritten techniques, keyboard equipment, or rubber stamp to retrieve uncollected funds.

Achievement Indicators: The learner:	Yes	No
1. Kept track of overdue accounts by watching or "aging" accounts during billing period -	____	____
2. Wrote or typed (or used rubber stamp) to remind customer that account is past due -	____	____
3. Followed up on reminder to determine if account had been paid -	____	____
4. Issued further reminders or notices as necessary -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:
patient ledger cards; rubber stamp (if appropriate); overhead projector

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many have kept track of overdue accounts? 2. Find out student's background prior to beginning of task. 3. Tell what is to be taught and why it is important. 4. Ask students what past experiences have aided their knowledge toward opening a patient account. 5. Using an overhead projector, show students the collection procedures using aging accounts system/letter system/rubber stamp method. 6. Review with students general guides for composing letters. 7. Have student practice aging accounts and processing notices to patients on overdue accounts. 8. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. Observe the presentation on aging accounts and processing notices to patients on overdue accounts. 2. Keep track of aging accounts by using the following steps: a. clip on tabs to show age of accounts under collection. - green - first notice - yellow - second notice - orange - third notice - red - last resort b. letter code system a) n 1; b) n 2; c) n 3; d) n 4 placed on patient's card to indicate when the notice was sent. c. use rubber stamp to indicate on statement when a warning was sent. d. follow-up to determine if account has been paid. 3. Review do's and don'ts in writing collection letters for aging accounts.

Duty: Performing Accounting, Banking, Credit and Payroll Functions

Duty No. D

Task No. 10

Task: Process unredeemed/dishonored checks using appropriate data to reinstate funds.

Achievement Indicators:

The learner:	Yes	No
1. Notified "payer" of check that has been dishonored or redeemed by the bank -	____	____
2. Requested immediate payment for the amount of the dishonored check -	____	____
3. Subtracted amount of dishonored check from last unused check stub in checkbook or check register balance -	____	____
4. Recorded amount of check on patient's ledger as a charge and added it to balance due -	____	____
5. Redeposited check if requested to do so by "payer" -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:

patient ledger cards; appropriate forms; checks, checkstubs or check register

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many have received a check marked NSF (not sufficient funds) or RTM (return to maker)? 2. Find out student's background prior to beginning of task. 3. Tell what is to be taught and why it is important. 4. Ask students what past experiences have aided their knowledge of dishonored checks. 5. Discuss reasons for NSF and suggest methods for redepositing checks, calling the maker of the check, subtracting amount from last checkstub, etc. 6. Show students how to record amount of dishonored check on patient ledger as an outstanding balance. 7. Have students practice following the process for handling dishonored checks. 8. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. After observing presentation on how to handle dishonored checks: a. notify the payer of the check promptly that the check has been dishonored and request a new check or other payment. b. may redeposit the check or secure another check from the payer. c. subtract amount of dishonored check from the last unused check stub in the check book or check register balance. d. record amount of check on patient's ledger as a charge and add to the balance due.

Duty:	Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.**	D
		Task No.	11

Task: Reconcile bank statements using appropriate forms to ensure proper balance.

Achievement Indicators: The learner:

		Yes	No
1.	Selected proper reconciliation form to be used -	_____	_____
2.	Gathered necessary documents: cancelled checks, bank statement, checkbook stubs or register -	_____	_____
3.	Compared cancelled checks with bank statement to determine which items listed as charges were checks and which are debit memos for other charges such as bank service charge -	_____	_____
4.	Arranged checks in numerical order and compared with checkbook stubs or register -	_____	_____
5.	Listed any check not yet paid by bank (not cancelled and returned by bank) on the reconciliation form as "Outstanding Checks" -	_____	_____
6.	Entered any deposit recorded in the checkbook stub/register, but not recorded on the bank statement on the reconciliation form as an "outstanding deposit" or "deposit in transit" -	_____	_____
7.	Recorded any other additions or subtractions in appropriate positions on the reconciliation form -	_____	_____
8.	Calculated the balance according to the checkbook and the balance according to the bank statement and verified that the two were in balance -	_____	_____
9.	If not in balance, located error(s) to correct mistake in checkbook or on bank statement -	_____	_____

Criteria:	Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
checks; checkbook register; bank statement; overhead projector	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many have reconciled a bank statement?	1. Observe presentation on how to properly reconcile a bank statement and gather all necessary documents, i.e., cancelled checks, bank statement, checkbook stubs/register.
2. Find out student's background prior to beginning of task	2. Compare cancelled checks and note any debit memos.
3. Tell what is to be taught and why it is important.	3. Arrange checks in numerical order and compare with checkbook stubs/register.
4. Discuss reason for reconciliation of a bank statement.	4. List any check not yet paid by bank (outstanding checks).
5. Using an overhead projector, show how a bank statement is reconciled.	5. Enter deposits recorded in checkbook/register but not recorded in bank statement (deposits in transit).
6. Have students practice all the steps learned in the presentation.	6. Record any other additions or subtractions in appropriate position on reconciliation form.
7. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	7. Calculate balance according to checkbook and balance according to bank statement and verify that the two are in balance.
	8. If accounts do not balance -- locate error(s) in checkbook or bank statement.

Duty:	Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.**	D
		Task No.	12

Task: Compile fee schedules using current parameters to provide necessary information.

Achievement Indicators: The learner:	Yes	No
1. Selected format to be used for fee schedule -	____	____
2. Using amounts determined by the doctor and entered fees for each type of service on the fee schedule form -	____	____
3. Posted fee schedule in convenient location so it can be referred to by both doctor and medical secretary when necessary -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
fee schedule form; chart/ overhead projector	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. do they have any idea what to charge for different medical services or what a fee schedule is? 2. Find out student's background prior to beginning of task. 3. Tell what is to be taught and why it is important. 4. Using chart/overhead, present how fees are determined and how fee schedule is compiled. 5. Tell the students some of the determining factors in fees: a. prevailing rates in the community b. doctor's fee profile 6. Show students a sample of a fee schedule. 7. Using a fee schedule determined by a doctor, have students compile a fee schedule on the appropriate form. 8. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. Observe demonstration of how fees are determined and how fee schedules are compiled and select a format to be used for a fee schedule. 2. Using a fee schedule, determined by a doctor, enter fees for each type of service on the schedule. 3. Post fee schedules in a convenient location for use by the doctor and medical secretary.

Duty: Performing Accounting, Banking, Credit and Payroll Functions

Duty No. D

Task No. 13

Task: Prepare checks using handwritten or mechanical techniques to pay amounts due.

Achievement Indicators: The learner:

	Yes	No
1. Filled in check stub or register with appropriate information (check number, amount, date, name of person to whom check is to be written, purpose of payment, previous balance, total, amount of this check, and new balance, if appropriate) -	____	____
2. Wrote or typed (or used mechanical device) appropriate information on the check (check number, date, payee, amount of check in digits, amount of check in words, authorized signature(s) of payer(s), if appropriate)-	____	____
3. Verified check amount with determined amount to be paid -	____	____
4. Recorded check number and date of payment on source document -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:

checks and stubs or check register; checkwriter (if available); source documents; overhead projector

Resources:

See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Ask students the following question: a. how many have typed/handwritten a check?	1. Observe presentation on preparing a check.
2. Find out student's background prior to beginning of the task.	2. Fill in a check stub or register with the appropriate information.
3. Ask students what past experiences have aided their knowledge toward writing a check.	3. Write/type appropriate information on check.
4. Tell what is to be taught and why it is important.	4. Verify check amount with determined amount to be paid.
5. Using an overhead, show the students a sample check and stubs and present the steps for writing checks.	5. Record check number and date of payment on source document.
6. Have students practice writing checks using the correct procedures.	
7. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	

Duty: Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.** D **Task No.** 14

Task: Control petty cash fund using appropriate forms to maintain proper balance.

Achievement Indicators: The learner:

	Yes	No
1. Determined amount of petty cash to be kept on hand -	____	____
2. Established petty cash fund by cashing a check in the amount of the determined amount to be kept in the fund and placing it in the petty cash box -	____	____
3. Replenished petty cash at end of month (or as needed) -	____	____
4. Proved petty cash fund -	____	____
5. Recorded expenses from petty cash fund on appropriate accounting form -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
petty cash forms (vouchers); expense form; check; petty cash box (if available); overhead projector	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many have used a petty cash fund?	1. Observe the presentation on how to handle a petty cash fund.
2. Find out student's background prior to beginning of the task.	2. Determine the amount of petty cash to be kept on hand.
3. Tell what is to be taught and why it is important.	3. Establish a petty cash fund by cashing a check in the determined amount to be kept in the petty cash box.
4. Ask students what past experiences have aided their knowledge of petty cash funds.	4. Replenish petty cash at the end of the month or as needed.
5. Using an overhead projector, show the students how to use a cash disbursement record, how to establish a petty cash fund, how to replenish a petty cash fund, who is responsible and the accounting procedures for maintaining the petty cash fund.	5. Prove petty cash fund.
6. Have student establish and replenish a petty cash fund and make appropriate entries on expense records for amounts spent using the fund.	6. Record expenses from petty cash fund on appropriate accounting form.
7. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	

Duty: Performing Accounting, Banking, Credit and Payroll Functions	**Duty No.** D **Task No.** 15

Task: Prepare payroll using time sheets/time cards and record of pay rate to provide pay to employees.

Achievement Indicators: The learner:	Yes	No
1. Gathered time sheet/time cards and other necessary information and supplies needed to complete payroll -	____	____
2. Used time sheet/time card to determine gross amount earned by each employee -	____	____
3. Computed employee deductions: FICA, income tax, other taxes and other deductions -	____	____
4. Recorded payroll information on appropriate payroll register or other payroll form -	____	____
5. Computed net wages for each employee and recorded on form -	____	____
6. Recorded payroll on each employee's earning record -	____	____
7. Recorded payroll on any other accounting forms, if appropriate -	____	____
8. Used handwritten or mechanical methods to prepare payroll checks -	____	____
9. Used appropriate procedures to prepare payroll envelopes for employees -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment: time sheet(s)/card(s); appropriate tax tables; payroll register or other payroll form(s); employee earning record; pegboard system (if appropriate); payroll envelope (if appropriate); payroll checks and stubs; checkwriter (if available); overhead proj.	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many have prepared a payroll?	1. Observe demonstration on how to prepare a payroll.
2. Find out student's background prior to beginning of the task.	2, Gather all necessary materials and information needed to complete a payroll.
3. Tell what is to be taught and why it is important.	3. Determine gross amount earned by each employee.
4. Ask students what past experiences have aided their knowledge of preparing a payroll?	4. Compute employee deductions regarding FICA, income tax, other taxes and other deductions .
5. Demonstrate how to gather time sheets/time cards and other necessary materials and information needed to complete a payroll.	5. Record payroll information on appropriate payroll register or other payroll forms.
6. Use an overhead projector and show all steps necessary to complete a payroll.	6. Compute net wages.
7. Have student practice preparing a payroll sheet.	7. Record payroll on each employee's earning record.
8. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	8. Record payroll on other accounting forms (if appropriate).
	9. Prepare payroll checks.
	10. Prepare envelopes for payroll checks.

Duty: Preforming Accounting, Banking, Credit and Payroll Functions

Duty No. D

Task No. 16

Task: Prepare tax reports using appropriate forms to comply with current tax legislation.

Achievement Indicators:

The learner:	Yes	No
1. Gathered appropriate tax forms and necessary information for tax form(s) to be completed -	____	____
2. Recorded correct information for tax period being covered on the appropriate tax form on the proper lines -	____	____
3. Checked to verify figures and information before submitting form to proper tax authority or agency for processing -	____	____
4. Completed tax form(s) according to current tax legislation -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed methods and current tax legislation.

Tools and Equipment:	**Resources:**
tax forms/reports	See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Ask the following question: a. how many have had the experience of preparing a tax form(s)? 2. Find out student's background prior to beginning of the task. 3. Tell what is to be taught and why it is important. 4. Ask students what past experiences have aided their knowledge in preparing tax forms. 5. Demonstrate how to gather appropriate tax forms and show students how to complete the forms to comply with tax current legislation. 6. Have student use the skill just learned and prepare selected tax forms. 7. Summarize for students what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. Observe demonstration of how to prepare tax forms. 2. Using appropriate tax forms, record correct information for the tax period being covered on appropriate lines. 3. Check to verify figures and information before submitting the form to the tax authority or agency for processing. 4. Complete tax forms according to current tax legislation.

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 1

Task: Take dictation using shorthand, speedwriting or stenotyping techniques and appropriate equipment to prepare documents.

Achievement Indicators: The learner:	Yes	No
1. Determined method of dictation to be used (shorthand, speedwriting, or stenotype) -	____	____
2. Assembled necessary equipment and/or supplies necessary for taking dictation -	____	____
3. Took dictation, using proper techniques for shorthand method being used -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to originator's specifications and knowledge of dictating procedures.

Tools and Equipment:
shorthand notebook and pens
or stenotype machine

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss use of dictation in an office.	1. Listen to introduction and instructions.
2. Describe dictation assignment.	2. Ask questions if procedures are unclear.
3. Instruct students to assemble equipment and/or supplies necessary for taking dictation.	3. Assemble equipment and/or supplies necessary for taking dictation.
4. Explain dictation procedures.	4. Assemble resource material.
5. Describe procedure to follow when dictation is completed.	5. Take dictation as instructed.
6. Explain standards and scale for evaluation.	6. Follow procedures as indicated when dictation is completed.
7. Dictate material to students or provide taped dictation material.	
8. Discuss problems encountered and make recommendations for improvement.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 2

Task: Transcribe dictated material using appropriate equipment to prepare documents.

Achievement Indicators: The learner:	Yes	No
1. Assembled necessary supplies and equipment for transcribing dictated material and set up equipment for transcribing -	____	____
2. Transcribed dictation as quickly and accurately as possible -	____	____
3. Used proper transcription techniques -	____	____
4. Recorded transcription speed and/or accuracy on log, if appropriate -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to originator's specifications and knowledge of transcribing procedures.

Tools and Equipment:
letterhead paper; prerecorded transcription; material or shorthand notes; for machine transcription a transcribing unit

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss value of transcription skills in a business office.	1. Listen to introduction and instructions.
2. Review forms of business correspondence.	2. Ask questions if procedures are unclear.
3. Describe assignment to be presented.	3. Assemble and ready equipment and supplies for transcribing.
4. Instruct students on procedures to be followed in transcribing.	4. Transcribe from prerecorded dictation or shorthand notes as instructed.
5. Describe procedure to be followed in checking work, if appropriate.	5. Follow instructions given by instructor for determining and recording transcription speed and/or accuracy.
6. Explain method of submitting work to instructor.	6. Submit work to instructor.
7. Assign equipment to be used, if appropriate.	
8. Point out location of supplies and resource material.	
9. Explain standards and scale for evaluation.	
10. Assign material to be transcribed.	
11. Allow students specified time to get set up and ready to start transcribing.	
12. Time work, if appropriate.	
13. Supervise checking of work, determining and recording transcription rate, if appropriate, and submitting work to instructor.	
14. Discuss any problems encountered in transcribing and ways of improving speed in transcribing.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 3

Task: Compose correspondence using verbal or writing skills and appropriate forms to communicate information to correspondent.

Achievement Indicators: The learner:

	Yes	No
1. Determined information or message to be communicated -	____	____
2. Determined method or type of communication to be used -	____	____
3. Determined style to be used, if appropriate -	____	____
4. Formulated an outline or brief idea of message to be communicated -	____	____
5. Composed the correspondence, using correct spelling, punctuation and grammar skills, in a neat, attractive, professional manner -	____	____
6. Proofread document -	____	____
7. Corrected all errors -	____	____
8. Typed final copy, if appropriate -	____	____
or		
9. Communicated information/message verbally -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:	**Resources:**
newsprint paper; bond paper; letterhead paper; correction materials	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss the following: a. types of communication -- verbal and written b. personal written correspondence c. written correspondence in business d. increasing demand for office employees to compose business correspondence 2. Describe task to be performed. 3. Present characteristics of good business correspondence. 4. Present examples of business correspondence which communicates information. 5. Present steps in composing business correspondence. 6. Assign correspondence to be composed and typed. 7. Instruct students on procedures to be followed in carrying out assignment. 8. Inform students of standards required for assignment and evaluation procedures to be used (achievement indicators). 9. Review characteristics of good business correspondence. 10. Discuss any special difficulty which students experienced. 11. Check assignment using achievement indicators. 12. Assign additional work as needed for student to successfully complete task.	1. Listen to introduction and presentation of task. 2. Ask questions when information is unclear. 3. Determine type of correspondence to be used. 4. Determine style to be used for correspondence. 5. Develop brief outline of information to be included in correspondence. 6. Compose the correspondence. 7. Proofread the correspondence. 8. Type the correspondence. 9. Submit completed work as instructed. 10. Listen to summary review of lesson. 11. Ask questions about any item that is unclear. 12. Compose and type additional assignment. 13. Submit work to instructor.

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 4

Task: Compose correspondence using verbal or writing skills and appropriate forms to request information from correspondent.

Achievement Indicators: The learner:	Yes	No
1. Determined the information to be requested -	____	____
2. Determined method or type of communication to be used -	____	____
3. Determined style to be used if appropriate-	____	____
4. Formulated an outline or brief idea of request to be made -	____	____
5. Composed the correspondence using correct spelling. punctuation, grammar skills, in a neat, attractive and/or professional manner -	____	____
6. Proofread document -	____	____
7. Corrected all errors -	____	____
8. Typed final copy, if appropriate -	____	____
or		
9. Communicated the request verbally -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:	**Resources:**
newsprint paper; bond paper; letterhead paper; correction materials	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss personal correspondence and types of business correspondence. 2. Describe task to be performed. 3. Present examples of correspondence similar to that to be composed and characteristics of good business correspondence. 4. Assign correspondence to be composed and typed. 5. Instruct students on procedures to be followed in performing task. 6. Inform students of standards required for assignment and evaluation procedures to be used (achievement indicators). 7. Review characteristics of good business correspondence. 8. Discuss any special difficulty which students experience. 9. Check assignment using achievement indicators. 10. Assign additional work as needed for student to successfully complete task.	1. Listen to introduction and presentation of task. 2. Ask questions when information is unclear. 3. Determine type of correspondence to be used. 4. Determine style to be used for correspondence. 5. Develop brief outline of information to be included in correspondence. 6. Compose correspondence requesting information. 7. Proofread correspondence. 8. Prepare mailable copy from rough draft or communicate request verbally. 9. Submit completed work as instructed. 10. Listen to summary review of lesson. 11. Ask questions about any item that is unclear. 12. Compose and type additional assignments. 13. Submit work to instructor.

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 5

Task: Produce documents using composition skills and appropriate forms to communicate information.

Achievement Indicators: The learner:	Yes	No
1. Reviewed instructions from requester of communication.	____	____
2. Assembled necessary supplies and/or equipment to produce required document -	____	____
3. Produced communication on the appropriate form, using communication skills and instructions of the requester -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the originator's specifications and knowledge of communication skills.

Tools and Equipment:	**Resources:**
documents to be completed; supplies and equipment to produce document	See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain purpose of documents.	1. Listen to introduction and explanation to teacher on how to produce documents.
2. Display types of documents used in office.	2. Ask questions if procedures are not clearly understood.
3. Indicate types of information included on documents.	3. Complete assignment as instructed on production of documents using specified forms and equipment.
4. Review use of any equipment to be used to produce documents.	
5. Describe task to be performed.	
6. Introduce forms/documents to be completed.	
7. Discuss information requested on forms/documents.	
8. Provide instructions for completing forms/documents.	
9. Explain procedure for completing forms/documents.	
10. Demonstrate production of document using necessary equipment.	
11. Explain evaluation standards.	
12. Provide information to be included on forms/document.	
13. Provide information to be produced on form/document.	
14. Assign exercise.	
15. Discuss any problems students encountered and make suggestions to facilitate the completion of the documents. Assign additional exercises as needed.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 6

Task: Prepare worksheets using composition skills and appropriate forms to communicate information.

Achievement Indicators: The learner:	Yes	No
1. Determined type of worksheet to be completed -	____	____
2. Gathered information to be recorded on worksheet -	____	____
3. Recorded the information on the proper lines, neatly and accurately, using correct procedures -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
worksheet to be completed	See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain the purpose of a worksheet and its use in a medical office. 2. Describe task to be performed. 3. Introduce worksheet to be completed 4. Discuss information included on worksheet. 5. Provide instructions for completing worksheet. 6. Explain procedures for completing worksheet. 7. Explain evaluation standards. 8. Provide information to be included on worksheet. 9. Provide worksheet to be completed. 10. Assign exercise on completing a worksheet. 11. Discuss any problems students encountered and make suggestions for facilitating the completion of worksheet. Assign additional exercises as needed.	1. Listen to introduction and explanations by instructor on how to complete worksheets. 2. Ask questions if procedures are not understood. 3. Complete assignment as instructed on completing and verifying worksheets.

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E
	Task No. 7

Task: Gather data using reference materials and resources to compile document information.

Achievement Indicators: The learner:	Yes	No
1. Determined data necessary to compile document information -	____	____
2. Obtained necessary reference materials and resources to locate correct data -	____	____
3. Located necessary data using reference materials and resources -	____	____
4. Recorded data on appropriate document -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment:	**Resources:**
typewriter, if appropriate; document to be completed	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with students proper use of reference and resource materials to derive data or information.	1. Observe demonstration.
2. Review with students how to compile derived data for completion of selected document.	2. Research necessary references and resources and gather necessary data to record on document to be completed.
3. Give out documents to be completed.	3. Observe demonstration of proper method for compiling and recording data derived from reference and resource materials.
4. Demonstrate to students how to record compiled data on appropriate document.	4. Record data on selected document in proper manner neatly and accurately.
5. Check completed documents for completeness and accuracy.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E
	Task No. 8

Task: Compile reports using appropriate forms, reference materials, resources, and composition skills to provide information.

Achievement Indicators: The learner:	Yes	No
1. Selected appropriate report form to be completed -	____	____
2. Determined and located necessary reference material to complete proper report -	____	____
3. Determined procedure or style to be used to complete report -	____	____
4. Compiled information from reference material and/or resources -	____	____
5. Completed report using information compiled from reference and/or resource materials -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment:	**Resources:**
typewriter or word processor, if appropriate; selected report form(s) to be completed	See Bibliography.

Teacher Activities	Student Learning Activities
1. Introduce to students the report form(s) to be completed.	1. Learn how to use appropriate reference and resource materials to derive necessary information for report or form(s).
2. Instruct students on use of appropriate reference and resource materials to be used to compile data for report.	2. Observe demonstration on how to compile needed information from reference/resource materials.
3. Demonstrate how to compile necessary information from reference/resource materials.	3. Compile necessary information for the form(s) distributed by the teacher.
4. Review format to be used on selected form(s) to be completed. (Refer to Procedures Manual if appropriate.)	4. Complete selected report or form(s) neatly and accurately using the compiled data.
5. Instruct students on how to complete selected form(s) using data compiled.	
6. Check completed forms for completeness and accuracy.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 9

Task: Type information using typing equipment and appropriate forms to prepare letters, labels, documents, forms, or statistical reports.

Achievement Indicators:

The learner:	Yes	No
1. Selected typing equipment to be used to complete the task -	____	____
2. Determined what business form(s) were to be completed -	____	____
3. Gathered necessary supplies and information to be typed on proper form(s) -	____	____
4. Typed appropriate message, information, or communication on form(s) using correct typing methods and procedures -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to correct typing procedures.

Tools and Equipment:

electric typewriter; electronic typewriter; word processor; selected form(s) to be typed; typing supplies (paper, correction materials); message, information or communication to be typed

Resources:

See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Review business formats to be typed. 2. Distribute assigned material to be typed of business formats. 3. Instruct students on how to type material on the specific formats to be used. 4. Demonstrate to students how to set up machine(s) to be used for necessary formats to be typed. 5. Check completed documents for neatness and accuracy.	1. Learn formats for selected documents to be typed. 2. Practice setting up typing equipment for various formats for documents to be typed. 3. Type assigned material on selected document(s) using correct format for each.

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 10

Task: Format information using forms to prepare letters, labels, documents, forms, or statistical reports.

Achievement Indicators: The learner:	Yes	No
1. Selected business form(s) to be completed -		
2. Gathered information to be included on the business form(s) -		
3. Arranged material in an attractive, clear, simole, coherent format according to form(s) being used and amount and type of information to be included on the form -		
4. Used keyboarding techniques to aid in formatting wherever possible and appropriate -		

Criteria: Competence in the task will be recognized when the procedure is performed according to established guidelines, using knowledge of technical keyboard techniques.

Tools and Equipment:	**Resources:**
electric typewriter; electronic typewriter; word processor; microcomputer, with WP interface; business form(s) to be completed; software for word processor (if appropriate); software for microcomputer (if appropriate)	See Bibliography.

Teacher Activities	Student Learning Activities
1. Select business form(s) to be completed and distribute to students.	1. Gather information from reference/resource materials to be arranged on business form(s).
2. Review how to gather and compile information for form(s) from reference and resource materials.	2. Arrange material neatly and logically on selected documents distributed by instructor.
3. Demonstrate how to arrange gathered material into proper format on form to be completed. (Use Procedures Manual, if appropriate.)	3. Use keyboard functions as automatic equipment to correctly format information on selected document(s).
4. Demonstrate use of keyboard techniques to format information automatically onto selected documents if Word Processor or Microcomputer is being used.	
5. Assign practice work on formatting information on various forms and documents.	
6. Observe students for proper keyboard techniques if automatic equipment is being used.	
7. Check completed business form(s) for neatness and accuracy in formatting.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E
	Task No. 11

Task: Proofread documents using visual and written communication skills to verify accuracy and completeness.

Achievement Indicators: The learner:	Yes	No
1. Scanned document for obvious errors in typing, spelling, grammar, punctuation, word division, format, etc. -	____	____
2. Made corrections, using correct proofreading marks as proofreading was being done -	____	____
3. Re-read line by line again for content the second time through and continued to correct errors as proofreading proceeded -	____	____
4. Verified accuracy and completeness of document -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established guidelines.

Tools and Equipment:	**Resources:**
document to be proofread	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review proofreading techniques.	1. Learn use of correct proofreading techniques.
2. Display and discuss proofreader's marks in making corrections on rough draft copy.	2. Learn use of proofreader's marks.
3. Assign several proofreading exercises using all proofreading marks.	3. Complete assigned exercises using correct proofreader's marks and proper proofreading techniques.
4. Observe students using correct proofreading techniques.	4. Verify accuracy and completeness of completed exercises.
5. Check exercises for accuracy and completeness.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 12

Task: Arrange data using established guidelines to organize information in tabular form.

Achievement Indicators: The learner:

	Yes	No
1. Determined data to be used in the tabulation -	____	____
2. Determined type of tabulation (format) to be used -	____	____
3. Determined column headings to be used according to data -	____	____
4. Arranged information under each column heading as appropriate -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedure.

Tools and Equipment:
data to be arranged in tabular form; business form(s) on which data will be arranged

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review setting up selected information in tabular form (tables).	1. Learn how to place selected information in tabular form under column headings.
2. Review selection and placement of columnar headings.	2. Complete assigned exercises by arranging selected information in tabular form neatly and accurately under appropriate column headings.
3. Assign several exercises to practice setting up information in tabular form with column headings.	
4. Check accuracy of exercises.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 13

Task: Categorize data using established guidelines to classify information.

Achievement Indicators: The learner:

	Yes	No
1. Selected information to be used -	____	____
2. Selected desired categories to be used -	____	____
3. Determined what information should be put into each category -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:

data to be categorized

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Review categories to be used.	1. Observe lesson on how to classify information into categories.
2. Illustrate how to logically classify selected information into categories.	2. Classify information given in assignment into proper categories.
3. Distribute list of categories, selected information and have student classify into proper categories.	3. Discuss reasons for use of each category.
4. Check accuracy of selection and discuss answers.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 14

Task: Prioritize jobs using priority schedules to produce documents on a timely basis.

Achievement Indicators: The learner:

	Yes	No
1. Determined priority for each type of job to be completed according to its importance and urgency of completion -	____	____
2. Recorded priorities on a schedule to become part of a procedures manual -	____	____
3. Used priority system daily to determine schedule for each day's work -	____	____
4. Set up document production schedule using priority system established -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment:

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review importance of various types of jobs and how they would be prioritized in the office.	1. Learn how to determine priorities for jobs in the office by order of importance.
2. Demonstrate how a priority schedule might be arranged.	2. Set up priorities for given jobs on a Priority Schedule.
3. Explain how priority schedules are used to set up daily document production schedules in the office.	3. Set up a Daily Production Schedule using the Priority Schedule set up previously.
4. Give students a list of several possible jobs and have students prioritize them on a Priority Schedule.	4. Discuss reasons for how priorities have been established for the given jobs.
5. Have students set up a Document Production Schedule using the Priority Schedule set up previously.	
6. Discuss answers.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 15

Task: Record information using appropriate equipment or manual techniques to update records.

Achievement Indicators: The learner:

	Yes	No
1. Selected materials or records to be updated -	____	____
2. Determined appropriate updating material and information to be used -	____	____
3. Used manual or mechanical techniques to record update of selected materials or records -	____	____

Criteria: Competence in the task will be recognized when the procedures are performed according to established guidelines.

Tools and Equipment:	**Resources:**
typewriter, word processor or writing implements	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask students if they have ever had to update any information. 2. Impress upon students importance of data always being up-to-date (especially in a medical office). 3. Lecture on various types of medical data which need to be updated regularly. 4. Demonstrate how to update various medical data using manual and mechanical techniques. 5. Assign practice exercises for students to update particular items of medical data (could be clinical data sheet for patient or patient history). 6. Review any problems students may have had in exercises and stress importance of proofreading and accuracy when updating medical records.	1. Listen to lecture on types of medical records which need to be updated. 2. Observe demonstration on how to update various types of medical records using manual or mechanical techniques. 3. Complete assigned exercise(s) on updating medical records. 4. Proofread and check all work for accuracy.

Duty: Maintaining Files, Records, and Logs

Duty No. F

Task No. 1

Task: Maintain records using knowledge of records management procedures to manage information.

Achievement Indicators: The learner: Yes No

1. Reviewed current records management procedures, i.e., proper retention policies and follow-up procedures - ____ ____
2. Applied proper code of ethics in releasing patient information - ____ ____
3. Determined appropriate filing method, i.e., alphabetic, numeric, geographic, subject, etc. - ____ ____
4. Gathered necessary supplies and collected items to be filed - ____ ____
5. Indexed and coded documents - ____ ____
6. Cross-referenced where appropriate - ____ ____
7. Arranged documents in desired filing sequence - ____ ____
8. Stored documents in designated filing area - ____ ____
9. Retrieved documents from the file - ____ ____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual and established records management procedures.

Tools and Equipment:
records to file; cross-reference sheets; file drawers (in cabinets, desks, etc.)

Resources:
See Bibliography.

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Teacher Activities	Student Learning Activities
1. Determine the background students have had in filing (give pretest if appropriate). 2. Review filing systems and procedures. 3. Review the filing rules for all methods of filing (alphabetic, numeric, geographic, subject, soundex, magnetic media). 4. Have students: a. read assigned materials and discuss. b. complete practice exercises(s), if necessary, on various rules and procedures. c. complete filing project(s). d. practice retrieving documents from file. e. cross-reference where necessary. 5. Give filing rules post-test or final test, if appropriate.	1. Take pretest on filing, if appropriate. 2. Attend lecture/discussion on filing rules and procedures. 3. Read and discuss chapters on filing rules and procedures. 4. Complete practice exercise(s), if necessary, on filing rules. 5. Complete any assigned filing project(s). 6. Retrieve documents from files. 7. Complete post tests, if appropriate.

Duty: Duplicating and Assembling Documents	**Duty No.** G **Task No.** 1

Task: Copy data using equipment or manual techniques to transfer data from one document to another.

Achievement Indicators:

The learner:	Yes	No
1. Selected technique and/or equipment to be used to transfer data from one document to another -		
2. Selected data to be copied -		
3. Determined number of copies to be made -		
4. Set up equipment or method of transfer -		
5. Made copies, following operating instructions with machine or proper manual techniques -		

Criteria: Competence in the task will be recognized when the procedure is performed according to established guidelines and equipment operating instructions.

Tools and Equipment:
copying equipment; transfer supplies; data to be copied

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask students if they have ever used a copier or any other method of transferring data from one document to another. 2. Review how copying is done and the types of equipment and methods that are available. 3. Tell students about the methods and equipment they will be expected to learn and use. 4. Demonstrate use of copying equipment to copy one document onto another. 5. Demonstrate manual technique of copying (handwritten copying) and emphasize the importance of accuracy. 6. Have students set up copier and copy several documents, if copier is available. 7. Have students manually transfer data from one document -- stressing complete accuracy. (A checklist may be used when evaluating students for these exercises.) 8. Give a post test on the operation of the copier, if appropriate.	1. Observe demonstration of how to operate copying equipment or how to manually transfer data from one document to another. 2. Complete assigned exercises in copying data. 3. Check accuracy of manually copied data. 4. Take post test, if appropriate.

Duty: Duplicating and Assembling Documents

Duty No. G

Task No. 2

Task: Duplicate documents using appropriate equipment to reproduce information.

Achievement Indicators: The learner:

	Yes	No
1. Selected information or materials to be duplicated -		
2. Selected equipment to be used for duplicating -		
3. Gathered necessary supplies for duplicating job -		
4. Set up equipment according to operator manual's instructions -		
5. Checked to be sure equipment is operating properly before beginning "run" -		
6. Operated duplicating equipment according to operating instructions to reproduce desired documents with clarity and accuracy -		

Criteria: Competence in the task will be recognized when the procedure is performed according to established guidelines and equipment operating instructions.

Tools and Equipment:

duplicating machine

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture/discussion on this task which may include: a. relate students' previous experience with duplicating machines to the use of the equipment in the medical office. b. determine students' previous background. c. introduce task as it relates to the medical office. 2. Demonstrate and discuss the procedure for operating the duplicating machine selected. 3. Assign several tasks using the duplicator selected. 4. Summarize task covered.	1. Attend lecture. 2. Observe demonstration by teacher on how to use duplicating equipment. 3. Demonstrate assigned tasks by operating the equipment. This may include (if appropriate): a. front feed copy b. cover feed copy c. book copy d. reduce copy e. unjam machine f. back to back copy g. adjust dials to compensate for light copy, for dark copy, and for dark background, if appropriate h. inking or priming machine Items to be copied might include: a. patient records b. insurance forms c. statements

Duty: Duplicating and Assembling Documents	**Duty No:** G **Task No.** 3

Task: Photograph documents using microfilming device to reproduce documents on microfilm.

Achievement Indicators:

The learner:	Yes	No
1. Selected document(s) to be microfilmed -	____	____
2. Gathered media and supplies necessary for reproduction into microfilm -	____	____
3. Selected microfilming method and equipment to be used -	____	____
4. Set up equipment according to operating instructions -	____	____
5. Checked equipment to be sure it was operating properly -	____	____
6. Prepared documents for filming - removed staples, arranged documents in correct filing order, destroyed unnecessary documents -	____	____
7. Photographed document(s) using proper equipment according to operating instructions -	____	____
8. Determined identification to be on film box for easy retrieval -	____	____
9. Checked developed microfilm for accuracy before destroying documents -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and operating instructions.

Tools and Equipment:	**Resources:**
microfilming equipment; microfilm; medical documents to be microfilmed	See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture/discussion on this task which may include: a. relate students' experiences with the microfilm in the library to the use of microfilm in the medical office. b. determine students' previous background. c. introduce task as it relates to the medical office. d. discuss the cost of microfilming. e. explain that the duplicated copy of film is stored in a different location. f. explain how to code film for easy retrieval. 2. Demonstrate and discuss the procedure for operating the microfilm machine. 3. Assign the task. 4. Summarize task covered.	1. Attend lecture. 2. Observe demonstration by teacher on how to operate a microfilm machine. 3. Demonstrate the operation of microfilming equipment. This may include microfilming case histories. 4. Establish a retrieval system. 5. Check developed film for accuracy.

Duty: Duplicating and Assembling Documents

Duty No. G

Task No. 4

Task: Collate documents using mechanical equipment or manual techniques to assemble documents in sequence.

Achievement Indicators: The learner:	Yes	No
1. Determined desired sequence of documents -	____	____
2. Set up collator according to operating instructions, if appropriate -	____	____
3. Inserted documents into collator in desired sequence or lay out manually in desired sequence -	____	____
4. Collated manually or by operating collator according to operating instructions -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedure and knowledge of collating equipment.

Tools and Equipment:
collating equipment (if available); documents to be collated

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain importance of being accurate in collating documents.	1. Observe demonstration.
2. Demonstrate correct collating procedures.	2. Practice collating by using selected documents.
3. Arrange for students to help in duplicating department in school or in office of school where help is needed in collating - optional.	3. Serve as helper in duplicating department of school to experience collating documents in a realistic situation and/or serve on work experience in office in order to collate documents, if appropriate.
4. Summarize task covered.	

Duty: Duplicating and Assembling Documents

Duty No. G

Task No. 5

Task: Bind documents using appropriate equipment or manual techniques to fasten documents.

Achievement Indicators: The learner:	Yes	No
1. Determined method of binding to be used -	____	____
2. Assembled documents or pages in desired sequence -	____	____
3. Set up equipment, if appropriate, according to instructions -	____	____
4. Bound documents or pages using appropriate supplies and/or equipment, using either mechanical or manual techniques -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures and knowledge of binding equipment.

Tools and Equipment:
equipment and or supplies to bind documents; documents to be bound

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain importance of being accurate in binding documents.	1. Observe demonstrate on binding.
2. Demonstrate binding procedure.	2. Practice binding documents using selected documents.
3. Arrange for students to help in duplicating department in school or in offices needing help with binding - optional.	3. Serve as helper in duplication department of school to experience binding documents in a realistic situation and/or serve on work experience in office to be able to bind documents, if appropriate.
4. Summarize task covered.	

Duty: Performing Word Processing

Duty No. H

Task No. 1

Task: Load software using appropriate commands to access software functions.

Achievement Indicators: The learner:	Yes	No
1. Activated the word processor -	____	____
2. Located system software media -	____	____
3. Selected appropriate software program (math, forms, etc.) -	____	____
4. Inserted software into activated system -	____	____
5. Operated proper keys, levers, or switches to load software -	____	____
6. Checked to insure software is properly loaded -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the operator's manual.

Tools and Equipment:
word processor or micro-computer with word processing interface; software media for hardware

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review how and why software is used in word processing. 2. Demonstrate how to activate the word processor (refer to operator's manual). 3. Show students where software is located and how to select proper software. 4. Demonstrate how to insert software into the WP system. (Refer to manual.) 5. Demonstrate how to load software. (Refer to operator's manual.) 6. Have students locate, select, insert, and load software into activated word processor. 7. Check to insure software was loaded correctly.	1. Observe how to locate and select the proper software media. 2. Observe demonstration of activating, inserting, and loading the software into the word processor. 3. Practice locating, selecting, inserting and loading software into activated word processor while being observed by the instructor.

Duty: Performing Word Processing	**Duty No.** H **Task No.** 2

Task: Input information using keyboard to record documents.

Achievement Indicators: The learner:	Yes	No
1. Reviewed originator's instructions for document to be input -	____	____
2. Inserted storage media into activated system -	____	____
3. Named new document -	____	____
4. Typed new document using automatic features of the system -	____	____
5. Proofread new document -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established procedures and knowledge of keyboard techniques.

Tools and Equipment:	**Resources:**
word processor or micro-computer with WP interface; storage media for word processor	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with students how to interpret originator's (author's) instructions for inputting document.	1. Learn to interpret originator's (author's) instructions for inputting a document. (May be on tape or rough draft.)
2. Demonstrate how to insert storage media into activate WP system. (Refer to operator's manual.)	2. Insert storage media according to operator's manual (or instructor's demonstration).
3. Discuss how to name or label new documents to be input.	3. Give new document a name or label.
4. Demonstrate how to input new document into system using automatic features of the system. (Refer to operator's manual.)	4. Input document using automatic features of system according to teacher's instruction or operator's manual.
5. Review proofreading techniques used to proofread input material before storage.	5. Proofread input document carefully.
6. Assign practice documents by various originators to be input into the WP machine, and proofread.	
7. Check document(s) for accuracy and neatness.	
8. Check to see that document was properly input.	

Duty: Performing Word Processing	**Duty No.** H **Task No.** 3

Task: Input information using keyboard to store documents.

Achievement Indicators: The learner:

	Yes	No
1. Selected information to be stored and keyed it into system -	____	____
2. Manipulated proper keys, levers and switches to store the newly keyed information -	____	____
3. Logged newly created document on storage media log, if appropriate -	____	____
4. Removed storage media from system -	____	____
5. Filed storage media in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, and established records management procedures.

Tools and Equipment:	**Resources:**
word processor or microprocessor with storage capabilities; storage media with log for WP system	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review keyboard techniques for inputting information into WP system. (Refer to operator's manual.)	1. Observe demonstration on proper techniques.
2. Demonstrate use of proper keys, levers, and switches used to store input information (refer to operator's manual).	2. Key assigned information into WP system, using proper keyboard techniques.
3. Demonstrate logging document on media log, if appropriate. (Refer to operator's manual.)	3. Store keyed in information using correct keys, levers, and switches.
4. Show student how to remove and file storage media properly in designated area.	4. Log information on storage media, if appropriate.
5. Observe and evaluate student practicing storage techniques, removal and filing of storage media.	5. Remove and file storage media in designated area.
6. Check to see that input material was properly stored.	

Duty: Performing Word Processing	**Duty No.** H **Task No.** 4

Task: Enter stored media using keyboard commands to retrieve/recall text.

Achievement Indicators: The learner:	Yes	No
1. Determined text to be retrieved/recalled -	____	____
2. Selected proper pre-recorded storage media -	____	____
3. Inserted storage media into activated system -	____	____
4. Retrieved storage media table of contents, index, menu or directory -	____	____
5. Identified text to be recalled -	____	____
6. Retrieved desired text using proper keys, levers, or switches -	____	____
7. Checked information to verify that the proper document had been retrieved -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, and established records management procedures.

Tools and Equipment:	**Resources:**
word processor or micro-computer with WP interface and storage capabilities; storage media with pre-recorded text	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with students how to select storage media that contains desired text to be recalled/retrieved.	1. Observe how to select storage media containing desired text.
2. Demonstrate how to properly insert storage media into activated machine. (refer to operator's manual).	2. Observe proper insertion of storage media into the WP system.
3. Demonstrate how to properly retrieve table of contents, index, menu or directory from the storage media. (Refer to operator's manual.)	3. Observe proper retrieval of table of contents, index, menu, or directory from the storage media.
4. Illustrate how to identify the text that is to be recalled/retrieved on the table of contents, index, menu, or directory. (Refer to operator's manual.)	4. Learn how to identify the text desired on the table of contents, index, menu, or directory of the storage media.
5. Demonstrate use of proper keys, levers, switches to retrieve desired text from storage media. (Refer to operator's manual.)	5. Observe proper use of keys to retrieve or recall the desired text from the storage media.
6. Observe students practicing the procedure for retrieving/recalling text from storage media and evaluate the students' performance.	6. Practice selection of correct storage media; inserting storage media into system; recalling table of contents, index, menu, or directory; identifying desired text on table of contents, index, menu, or directory; and retrieving/recalling correct text back into memory for revision or printing.
7. Check to see that the proper document was retrieved/recalled.	7. Check to see that proper document has been retrieved/recalled.

Duty: Performing Word Processing

Duty No. H

Task No. 5

Task: Enter stored media using keyboard commands to communicate information.

Achievement Indicators: The learner:	Yes	No
1. Determined information to be communicated -	____	____
2. Selected proper software for type of communication selected -	____	____
3. Inserted software into activated system -	____	____
4. Loaded the communications software -	____	____
5. Checked to be sure proper communication peripherals were activated -	____	____
6. Located proper storage media containing desired information -	____	____
7. Inserted proper storage media into activated system -	____	____
8. Checked with the receiver to verify that receiver was ready to receive -	____	____
9. Used proper keys, levers, switches to communicate information -	____	____
10. Verified that receiver had received all of the communication -	____	____
11. Terminated the communication -	____	____
12. Removed storage media and filed it in appropriate area -	____	____
13. Logged communication activity on proper records, if appropriate -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, and established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment:	**Resources:**
word processor or micro-computer with WP interface; communication peripheral for WP equipment; software for WP or micro-computer system (communications software); storage media for system being used; log for recording communication activity, if appropriate	See Bibliography.

Teacher Activities	***Student Learning Activities***
1. Review selection of proper software for type of communication selected.	1. Learn how to properly select communication software.
2. Review insertion of software into the system.	2. Learn how to insert communication software into the activated system.
3. Teach proper method for loading the communications software into the system using the proper machine functions.	3. Learn how to properly load communications software into the system.
4. Demonstrate how to activate the communication peripheral.	4. Learn how to activate the communication peripheral.
5. Review how to select and insert the proper storage media into the activated system.	5. Learn how to select and insert the proper storage media into the system.
6. Demonstrate how to check with receiver that it is ready to receive the communication.	6. Learn how to check with the receiver to see if it is ready to receive.
7. Demonstrate how to communicate the desired information using the correct keys, levers, and switches.	7. Learn how to communicate the desired information using the correct keys, levers, and switches.
8. Teach students how to verify that the communication has been received.	8. Learn how to verify that the communication has been received.
9. Teach students how to terminate the communication.	9. Learn how to terminate the communication.
10. Review with students how to remove storage media and file it in the appropriate area.	10. Learn how to properly remove and file the storage media in the proper area.
11. Review with students how to log communication, if appropriate.	11. Learn how to properly log the communication, if appropriate.
12. Observe and evaluate students while students are performing all the above functions.	12. Demonstrate knowledge of all of the above functions to the instructor while being observed and evaluated.

Duty: Performing Word Processing

Duty No. H

Task No. 6

Task: Enter stored media using keyboard to revise text.

Achievement Indicators: The learner:	Yes	No
1. Determined text to be revised -		
2. Inserted proper software into activated system -		
3. Selected and inserted proper storage media containing stored text to be revised -		
4. Retrieved proper document and operated functions to get to proper area of document to be revised -		
5. Performed desired revisions (change, insert, delete, move) -		
6. Stored the revised document using proper system functions -		
7. Logged revised document on proper record, if appropriate -		
8. Removed storage media and filed in appropriate area -		

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidlines, established records management procedures, and knowledge of text editing and keyboard techniques.

Tools and Equipment:

word processing system or microcomputer with word processing interface and with text-editing capabilities; software for system being used; storage media for system being used; operator's manual for system being used; log on which to record revised document. if appropriate

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review selection and identification of text to be revised on storage media.	1. Learn how to select correct software and insert it correctly into the WP system.
2. Review proper technique for inserting software into activated system.	2. Learn how to select the correct storage media and insert it into the WP system.
3, Review proper technique for selecting and inserting storage media into activated system.	3. Learn how to retrieve/recall the proper text to be revised from the storage.
4. Review correct use of keys, levers, and switches to retrieve/recall proper text and to get to proper area of document to be revised.	4. Learn how to make the necessary revisions and changes on the recalled text.
5. Instruct in use of keys, levers, and switches for making changes necessary to correctly revise the document.	5. Learn how to store the revised document using the proper keys, levers, and switches on the storage media.
6. Instruct in proper technique for storing the revised document using proper system functions.	6. Learn how to log the revised document on the proper log sheet, if appropriate.
7. Instruct in proper technique for logging the revised document, if appropriate.	7. Learn how to properly remove and file the storage media containing the revised document in the appropriate area.
8. Demonstrate removal and filing of the storage media.	8. Practice all of the above functions while being observed and evaluated by the instructor.
9. Observe and evaluate students' performance of all the above procedures.	9. Verify that the correct document has been revised and properly stored.
10. Check the revised document for accuracy and neatness.	

Duty: Performing Word Processing

Duty No. H

Task No. 7

Task: Enter instructions using keyboard commands to print documents.

Achievement Indicators: The learner:	Yes	No
1. Determined text to be printed out -	____	____
2. Selected proper storage media containing desired text and inserted it into activated system -	____	____
3. Prepared printer for printing of the document -	____	____
4. Instructed system to print the correct document -	____	____
5. Logged printed document on records management form -	____	____
6. Removed storage media and filed it in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment:
word processor or micro-computer with WP interface,(either must be equipped with a printer); storage media for system being used; paper for printing out document; records management log for logging printed document (if appropriate

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review how to determine text to be printed out.	1. Learn how to determine text to be printed out.
2. Review proper selection and insertion of storage media into programmed, activated system.	2. Learn how to select proper storage media and insert it into the activated and programmed system.
3. Instruct students in proper preparation of printer for printing out the document.	3. Learn how to prepare the printer to print out the desired document.
4. Demonstrate how to use keys, levers, and switches correctly to instruct the system to print out the correct document.	4. Learn how to use the proper keys, levers, switches to instruct the system to print out the proper document.
5. Instruct student on proper technique for logging the printed document on the records management forms (if appropriate).	5. Learn how to log the printed document on the records management log form, if appropriate.
6. Review proper removal and filing of the storage media.	6. Learn how to properly remove and file the storage media after printing the desired text.
7. Observe and evaluate students while performing all of the above functions.	7. Practice the above functions while being observed and evaluated by the instructor.
8. Check to see that the proper document was printed out.	8. Verify that the proper document was printed out.
9. Check to see that the printed document was logged correctly on the records management forms, if appropriate.	

Duty: Performing Word Processing

Duty No. H

Task No. 8

Task: Originate forms using word processing software/hardware to meet requester's needs.

Achievement Indicators: The learner:	Yes	No
1. Determined type of form needed by requester -	____	____
2. Planned form -	____	____
3. Inserted appropriate software into system to create desired form -	____	____
4. Keyed in form using appropriate system functions and keyboard techniques -	____	____
5. Obtained appropriate forms control approval from requester -	____	____
6. Inserted storage media and stored form, if appropriate -	____	____
7. Logged on appropriate records management form, if appropriate -	____	____
8. Removed storage media and filed in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment:
word processor or microcomputer with word processing interface and software media for this hardware; storage media; requester's instructions for form; records management log, if appropriate

Resources:
See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Review purpose and creation of forms using word processing equipment. 2. Review selection and insertion of proper software into activated system. 3. Demonstrate (or refer to operator's manual) how to use proper keys to create desired form. 4. Demonstrate how to obtain approval of request for appropriate forms control. 5. Demonstrate (or refer to manual) how to select, insert storage media, and use proper keys to store form on storage media. 6. Demonstrate how to log creation and storage on appropriate records management form, if appropriate. 7. Demonstrate (or refer to manual) how to remove storage media and file it in designated area.	1. Listen to review or lecture on purpose and creation of forms using word processing equipment. 2. Observe demonstration (or read in manual) of how to select and insert proper software into activated system for creation of desired form. 3. Plan form to be created, using techniques taught by instructor and directions from requester. 4. Observe demonstration (or read in operator's manual) how to use correct keys to create desired form on word processor to specifications of requester. 5. Operate proper keys and create desired form. 6. Observe demonstration on how to obtain requester's approval for forms control. 7. Have form approved by requester. 8. Observe demonstration (or read in operator's manual) on how to select, insert storage media, and store created form. 9. Store form on storage media. 10. Observe demonstration (or read in manual) how to log form, if appropriate. 11. Log form on proper records management form, if appropriate. 12. Observe demonstration (or read in manual) how to remove and store the storage in designated area. 13. Store media properly in designated area.

Duty: Performing Word Processing

Duty No. H

Task No. 9

Task: Program document format using word processing software/hardware to develop a new printed document.

Achievement Indicators: The learner:	Yes	No
1. Determined document format to be programmed -	____	____
2. Planned program -	____	____
3. Inserted appropriate software into system to allow for desired programming -	____	____
4. Used system functions to create desired programmed format -	____	____
5. Inserted storage media and stored new forat if appropriate -	____	____
6. Logged new format on appropriate records management forms, if appropriate -	____	____
7. Operated print mechanism to check accuracy of new programmed format -	____	____
8. Removed storage media and filed in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment:	**Resources:**
word processor or microcomputer with word processing interface and software with proper programming for formatting; storage media; records management log, if appropriate	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review programming and formatting for word processing applications. 2. Demonstrate how to plan a document format. 3. Demonstrate how to select appropriate software for programming and how to insert in and load it into activated system. 4. Demonstrate (or refer to operator's manual) how to use system functions to create desired programmed format. 5. Demonstrate (or refer to operator's manual) how to insert storage media and store new format, if appropriate. 6. Demonstate (or refer to operator's manual) how to log new format, if appropriate. 7. Demonstrate (or refer to operator's manual) how to print out new format to check it for accuracy. 8. Demonstrate (or refer to operator's manual) how to remove and file storage media in designated area.	1. Listen to review of programming and formatting using word processing. 2. Observe demonstration of how to plan a new document format. 3. Plan a new document format. 4. Observed demonstration or read in manual how to select appropriate software for programming the new format and how to insert and load it into the activated system. 5. Select, insert, and load appropriate software into activated system for programming the new format. 6. Observe demonstration (or read in manual) how to operate system functions to program the new format. 7. Program the new format using the proper machine functions. 8. Observe demonstration (or read in manual) on how to insert storage media and operate keys to store new format. 9. Store new programmed format using the appropriate machine keys. 10. Observe demonstration on how to log new programmed format, if appropriate (or read in operator's manual). 11. Logged new programmed format using appropriate records management forms. 12. Observe demonstration on how to print out new programmed format to check for accuracy (or read in manual). 13. Print out new programmed format and check for accuracy. 14. Observe demonstration of how to remove and file storage media (or read in operator's manual). 15. Remove and store (filed) storage media and file in designated area.

Duty: Performing Word Processing	**Duty No.** H **Task No.** 10

Task: Program forms using word processing programmed software/hardware to fill in pre-printed forms.

Achievement Indicators: The learner:	Yes	No
1. Selected pre-printed form to be completed -	____	____
2. Determined information to be printed on pre-printed form -	____	____
3. Inserted pre-printed form into printer -	____	____
4. Inserted programmed software into system -	____	____
5. Input information to be printed on form into system, using appropriate system functions and keyboard techniques -	____	____
6. Keyed in comamnds for system to print input information onto pre-printed form -	____	____
7. Logged activity on proper records management forms -	____	____
8. Removed and stored programmed software in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment:	**Resources:**
word processor or microcomputer with word processing interface and software with proper programming for use in filling in pre-printed forms; storage media; pre-printed forms; records management log, if appropriate	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review use of pre-printed forms using word processing applications.	1. Listen to review of use of pre-printed forms completed on a word processor.
2. Distribute pre-printed forms and necessary information to be entered on the forms.	2. Observe insertion of pre-printed form into printer (demonstration or read in operator's manual).
3. Instruct in inserting pre-printed form correctly into printer.	3. Insert pre-printed form into printer, using correct techniques to align properly.
4. Demonstrate selection, insertion, and loading of proper software into activated system (or refer to manual)	4. Observe demonstration (or read in manual) on how to select, insert, and load proper software into activated system for printing pre-printed forms.
5. Demonstrate how to operate proper system functions and keyboard techniques to input information to be printed on form (or refer to manual).	5. Select, insert, and load the correct software into the activated system.
6. Demonstrate command system to print input information onto pre-printed form (or refer to manual).	6. Observe demonstration or read in manual on how to operate proper machine functions and keyboard techniques to input desired information that is to be printed on pre-printed form.
7. Demonstrate proper technique for logging the activity on the proper records management forms, if appropriate (or refer to manual).	7. Input necessary information to be printed on pre-printed form into system, using correct machine functions and keys.
8. Demonstrate how to properly remove and file storage media (or refer to manual).	8. Observe demonstration (or read in manual) on how to command system to print the input information on the pre-printed form.
	9. Command system to print input information on the pre-printed form using proper functions and keys on the machine.
	10. Observe demonstration (or read in manual) on how to log the activity on the proper records management forms, if appropriate.
	11. Log the activity, if appropriate using the correct records management forms.
	12. Observe demonstration (or read in operator's manual) how to remove and file storage media.
	13. Remove and file storage media in the designated area.

Duty: Performing Word Processing	**Duty No.** H **Task No.** 11

Task: Process management records using word processing software/hardware to generate data/information.

Achievement Indicators: The learner:	Yes	No
1. Determined management record to be processed -	____	____
2. Determined data/information to be generated -	____	____
3. Selected appropriate programmed software to process records and inserted into system -	____	____
4. Input information to generate data/information using system functions and proper keyboard techniques -	____	____
5. Logged activity on appropriate records management form -	____	____
6. Removed programmed software and stored it in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment:	**Resources:**
word processor or microcomputer with word processing interface and software with proper programming for use in filling in pre-printed forms; storage media; management record to be completed; selected information to be input on management record	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review processing of management records. 2. Demonstrate (or refer to manual) how to select, insert and load appropriate programmed software into activated system. 3. Demonstrate (or refer to manual proper techniques for inputting the selected data/information into the system. 4. Demonstrate (or refer to manual) how to log activity on proper records management forms. 5. Demonstrate (or refer to manual) how to properly remove and file storage media in designated area.	1. Listen to review on processing management records using word processing equipment and software. 2. Select, insert, and load appropriate programmed software to generate management records into activated system, using techniques observed in teacher's demonstration or read in operator's manual. 3. Input correct data/information into system, using proper keyboard techniques and machine functions as observed in demonstration by teacher or read in operator's manual. 4. Check accuracy of generated management record(s). 5. Log activity, using proper records management forms, if appropriate, according to demonstration or operator's manual. 6. Remove and file storage media in designated area according to operator's manual or demonstration by teacher.

Duty: Performing Word Processing

Duty No. H

Task No. 12

Task: Locate information using reference materials to process a document.

Achievement Indicators: The learner:

	Yes	No
1. Determined information needed to process desired document -	____	____
2. Located necessary reference materials to find information -	____	____
3. Located necessary information in the reference materials -	____	____
4. Processed the document according to established standards -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment:

word processor or microcomputer with word processing interface and software with proper programming

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Review selection and use of reference materials.	1. Listen to review of selection and use of reference materials.
2. Review processing documents using word processing equipment.	2. Listen to review of processing of documents using word processing equipment.
3. Demonstrate processing of document on word processor (or refer to operator's manual) using established standards.	3. Observe demonstration of processing of document (or read in operator's manual) on word processor.
	4. Determine information needed to process desired document.
	5. Locate necessary reference materials to find desired information.
	6. Locate necessary information in the reference material.
	7. Process the document using the acquired information from the reference materials and proper techniques on the word processor.
	8. Check accuracy of processed document.

Duty: Performing Word Processing

Duty No. H

Task No. 13

Task: Retrieve information using a programmed software package to obtain key information.

Achievement Indicators: The learner:

	Yes	No
1. Determined key information to be retrieved -	____	____
2. Selected programmed software for retrieval of proper information -	____	____
3. Inserted programmed software into system -	____	____
4. Keyed in commands to retrieve key information -	____	____
5. Verified accuracy of information retrieved -	____	____
6. Logged activity on records management form, if appropriate -	____	____
7. Removed and stored programmed software in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:
word processor or microcomputer with word processing interface and software with proper programming; storage media; records management form, if appropriate

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review retrieval procedure for the word processing equipment.	1. Listen to the review of the procedure for retrieval of key information from appropriate storage media on the word processing system.
2. Review selection, insertion, and loading of programmed software into the active system.	2. Select, insert, and load the proper programmed software and storage media using knowledge gained in the review and demonstration by the teacher of these procedures (or refer to the operator's manual).
3. Demonstrate selection, insertion, and loading of programmed software into activated system (or refer students to operator's manual for the procedure).	3. Retrieve the selected key information from the storage media using the proper techniques as demonstrated by the teacher (or as referred to in the operator's manual).
4. Demonstrate procedure to retrieve the desired key information from the proper storage media (or refer to manual).	4. Verify the accuracy of the information retrieved.
5. Demonstrate (or refer to manual) how to log the activity on proper records management forms.	5. Log the activity on the proper records management forms, if appropriate, as learned from teacher's demonstration (or according to instructions in the operator's manual).
6. Demonstrate (or refer to manual) how to remove and store (file) the storage media and the programmed software in the designated area.	6. Remove and store programmed software and storage media and file in designated area according to instructions by teacher (or operator's manual).

Duty: Performing Word Processing

Duty No. H

Task No. 14

Task: Select blocks of information using text editing techniques to prepare a new printed document.

Achievement Indicators: The learner:	Yes	No
1. Determined new document to be printed by the system -		
2. Located proper storage software and inserted it into system -		
3. Determined location on software of blocks of information to be used in preparing the new document -		
4. Accessed proper blocks of information by operating proper system functions -		
5. Prepared new printed documents using knowledge of and techniques in text editing -		
6. Prepared printer and printed new document -		
7. Verified accuracy of new document -		
8. Stored new document, if appropriate -		
9. Logged activity on proper records management form -		
10. Removed and stored software in designated storage area -		

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established records management procedures, and knowledge of keyboarding and system techniques.

Tools and Equipment: word processor or microcomputer with word processing interface and software with proper programming; storage media; records management forms, if appropriate

Resources: See Bibliography.

Teacher Activities	Student Learning Activities
1. Review process for selecting locks of information from storage media to be used to create new documents by using text editing techniques on the word processing equipment.	1. Listen to review of the process for selecting blocks of information from proper software storage media and using text editing techniques to create new documents using the accessed block(s) of information.
2. Demonstrate selection, insertion, and loading of proper software and storage media into activated system.	2. Select, insert, and load programmed software and storage media into activated system, according to instructions by teacher or in manual.
3. Demonstrate use of proper techniques to access necessary block information and text editing procedure to create the new document using the located block (or refer to procedure in operator's manual).	3. Access necessary blocks of information from proper storage media and used proper text editing techniques to create new document according to demonstration by teacher or instructions in operator's manual.
4. Demonstrate printer preparation and proper techniques for printing the newly created document (or refer to operator's manual for the procedure).	4. Prepare printer and print new document according to teacher demonstration or instructions in operator's manual.
5. Verify accuracy of new document.	5. Verified the accuracy of the new document.
6. Demonstrate how to store the new document on the storage media, if appropriate (or refer to operator's manual).	6. Store new document, if appropriate, using knowledge from teacher's demonstration or instructions from operator's manual.
7. Demonstrate how to log activity, if appropriate, on proper records management forms.	7. Log activity, if appropriate, on proper records management forms, using proper techniques as demonstrated by teacher.
8. Demonstrate removal and filing (storage) of software and storage media.	8. Remove software and storage media and file in designated area according to instructions of teacher.

Duty: Performing Word Processing	**Duty No.** H **Task No.** 15

Task: Assemble information from any media using keyboard techniques to create a new printed document.

Achievement Indicators: The learner:	Yes	No
1. Determined information needed for new document to be created -	____	____
2. Determined location in the media of information to be used -	____	____
3. Located and inserted software media containing information -	____	____
4. Created new document to be printed using knowledge of text editing techniques and keyboarding skills -	____	____
5. Prepared printer and keyed commands to system to print new document -	____	____
6. Verified correctness of new document -	____	____
7. Stored new document on storage media, if appropriate -	____	____
8. Logged activity on proper records management forms, if appropriate -	____	____
9. Removed and stored software media in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established records management procedures, and knowledge of keyboarding and system techniques.

Tools and Equipment:	**Resources:**
word processor or microcomputer with word processing interface and software with proper programming; storage media; records management form, if appropriate	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review locating information on storage media of a word processor for use with text editing techniques to create a new document.	1. Listen to the review on how to locate needed information on the storage media of a word processor and use it to create a new document, using text editing techniques.
2. Demonstrate location, insertion, and loading of software and storage media needed to locate information needed to create a new document (or refer to operator's manual).	2. Determine the information needed from the storage media and the new document to be created.
3. Demonstrate how to access necessary information on storage media and use text editing techniques to create a new document (or refer to operator's manual).	3. Select, insert, and load the software and storage media into the activated machine according to the instructor's demonstration or instructions in the operator's manual.
4. Demonstrate how to prepare printer and print the newly created document using proper keys and functions on the word processor.	4. Access the necessary information from the storage media and create the new document using proper text editing techniques as demonstrated by the teacher or as instructed in the operator's manual.
5. Verify the correctness of the newly created and printed document.	5. Prepare the printer and print the new document using proper techniques as demonstrated by the teacher or as instructed in the operator's manual.
6. Demonstrate how to store the newly created document, if appropriate (or refer to instructions in operator's manual).	6. Verify the correctness of the newly created and printed document.
7. Demonstrate how to log the activity, if appropriate, using the proper records management forms.	7. Store the newly created document, if appropriate, according to the instructor's demonstration or instructions in the operator's manual.
8. Demonstrate how to remove and store (file) the software and storage media (or refer to the operator's manual).	8. Log the activity, if appropriate, as instructed by the teacher.
	9. Remove and file (store) the software and storage media according to the demonstration by the teacher or the instructions in the operator's manual.

Duty: Performing Word Processing	**Duty No.** H **Task No.** 16

Task: Sort information using programmed software to select fields of information according to pre-defined criteria and knowledge of word processing procedures, to create a new printed document.

Achievement Indicators: The learner:	Yes	No
1. Determined desired fields of information to be sorted -	____	____
2. Inserted proper programmed software into system capable of completing the sort routine -	____	____
3. Inserted proper storage software media into system containing fields to be sorted -	____	____
4. Used sort function on system to select desired fields of information -	____	____
5. Prepared printer and keyed commands to system to print new document -	____	____
6. Verified correctness of new document -	____	____
7. Stored new document on storage media, if appropriate -	____	____
8. Logged activity on proper records management forms, if appropriate -	____	____
9. Removed and stored software media in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual and knowledge of system and keyboard techniques.

Tools and Equipment:	**Resources:**
word processor or microprocessor; appropriate software for machine	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss need for sorting information for reports, research, etc.	1. Listen to introduction and instructions.
2. Describe lesson to be presented.	2. Observe demonstration on sorting.
3. Explain software to be used.	3. Ask questions if procedure is not understood.
4. Demonstrate procedure for sorting information and printing new document.	4. Perform exercise of sorting information and creating a new document according to achievement indicators.
5. Explain evaluation procedures.	5. Submit work as instructed.
6. Assign exercise for sorting information and printing new document.	
7. Check any problems encountered and assign additional work if needed.	

Duty: Performing Word Processing	**Duty No.** H **Task No.** 17

Task: Manipulate files using keyboard commands to merge stored information from any file(s) into another file.

Achievement Indicators: The learner:

	Yes	No
1. Determined files to be merged -	____	____
2. Inserted software media necessary to complete merge operation -	____	____
3. Merged files into one another using appropriate keyboard commands and text editing knowledge -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the operator's manual and established text editing procedures.

Tools and Equipment:	**Resources:**
word processor or microcomputer; appropriate software for machine	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss value of being able to combine (merge) information without retyping.	1. Listen to introduction and instructions.
2. Explain process of merging information and describe assignment to be performed.	2. Observe demonstration on merging.
3. Explain software to be used and how to insert it.	3. Ask questions if procedure is not understood.
4. Demonstrate procedure for merging stored information from any file into another file.	4. Perform exercise of merging stored information from any file into another file according to achievement indicators.
5. Explain evaluation process.	5. Submit work as instructed.
6. Assign exercise for merging information stored in a file into another file.	
7. Check any problem encountered and assign additional work as needed.	

Duty: Performing Word Processing	**Duty No.** H **Task No.** 18

Task: Perform mathematical calculations using keyboard and programmed software to verify document information.

Achievement Indicators: The learner:

	Yes	No
1. Determined mathematical calculations to be performed -	____	____
2. Inserted appropriate programmed software to complete verification of document information -	____	____
3. Performed proper mathematical calculations, using calculator keyboard, if appropriate, to verify document information -	____	____
4. Verified that document information was correct -	____	____
5. Removed programmed software and stored in appropriate area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's instructions and knowledge of mathematical calculations and text editing skills.

Tools and Equipment:	**Resources:**
word processor or microcomputer ; appropriate software for machine	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss verifying correctness of mathematical computations and give examples.	1. Listen to presentation and instructions.
2. Describe task to be presented.	2. Determine mathematical calculations to be performed.
3. Explain software to be used and how to insert it.	3. Insert appropriate programmed software to complete verification of document information.
4. Demonstrate procedure for verifying document information by using mathematical calculations.	4. Perform proper mathematical calculations, using calculator keyboard, if appropriate, to verify document information.
5. Explain evaluation procedures.	5. Verify document information.
6. Assign exercise verifying document information.	6. Remove programmed software and store in appropriate area.
7. Check any problems encountered and assign additional work if needed.	7. Submit completed work as instructed.

Duty: Performing Word Processing

Duty No. H

Task No. 19

Task: Perform media maintenance routines using knowledge of system operations to maintain file media.

Achievement Indicators: The learner:	Yes	No
1. Determined necessary maintenance routines for system software (file media) -	____	____
2. Performed function on system to replace partially or fully damaged media using knowledge of system operations -	____	____
3. Logged information created/stored on the media to identify information -	____	____
4. Used proper tools (felt-tip pens, pencil) to catalog media according to manufacturer's specifications -	____	____
5. Cataloged the media (according to employer's specifications and/or procedures manual) to identify media -	____	____
6. Stored media in protective covering (according to manufacturer's specifications) -	____	____
7. Stored media in cool, dry, designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to manufacturer's specifications and/or employer's procedures manual and/or operator's instructions.

Tools and Equipment:	**Resources:**
word processor or microcomputer; software for machine to include file media; log; tools (supplies) to catalog media	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss filing systems and media files.	1. Listen to introduction and explanation by instructor on maintaining file media.
2. Describe task to be presented.	2. Observe demonstration on how to maintain file media.
3. Explain software to be used and how to insert it.	3. Ask questions if explanations are not clearly understood.
4. Demonstrate procedure for maintaining file media.	4. Complete assignment by properly inserting software and performing media maintenance routines.
5. Explain evaluation procedures.	
6. Provide file media to be used in performing task.	
7. Provide instructions for completing task.	
8. Assign exercise.	
9. Discuss any problems encountered and assign additional exercises as needed.	

Duty: Maintaining Inventory	**Duty No.** I **Task No.** 1

Task: Maintain stock using inventory control forms to ensure adequate inventory levels.

Achievement Indicators: The learner:

	Yes	No
1. Selected proper inventory control forms, if appropriate -	____	____
2. Verified quantity received -	____	____
3. Recorded receipt of supplies/materials on inventory control form, if appropriate -	____	____
4. Checked mini-max quantity levels -	____	____
5. Processed requisitions for supplies/materials from stock -	____	____
6. Distributed supplies/materials to designated individual/department -	____	____
7. Recorded inventory change on inventory control form, if appropriate -	____	____
8. Determined quantities to be ordered to maintain inventory levels -	____	____
9. Completed order form and submitted to Accounts Payable Department to be processed -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to internal purchasing procedures and inventory control procedures.

Tools and Equipment:	**Resources:**
inventory control forms; vendors' catalogs; order forms; requisition forms	See Bibliography.

Teacher Activities	Student Learning Activities
1. Relate the procedure of maintaining inventory to keeping the kitchen shelves stocked with enough food.	1. Attend lecture on inventory control.
2. Lecture on procedure for taking inventory and for using inventory control forms, processing stock requisitions and ordering supplies/materials, including clinical and laboratory supplies, and drugs and medications for medical facilities.	2. Complete simulated project or assignment involving all phases of inventory control.
3. Complete project(s) on: a. checking inventory b. processing requisitions c. proper distribution d. ordering to maintain proper inventory levels e. keeping proper inventory records	3. Complete test on inventory control.
4. Evaluate with a short-answer and/or project test.	

Duty: Maintaining Machines and Office Equipment	**Duty No.** J **Task No.** 1

Task: Analyze equipment malfunction using a knowledge of system operations to identify cause of malfunction.

Achievement Indicators:

The learner:	Yes	No
1. Read the manufacturer's operating and maintenance manual to become familiar with system operation and maintenance procedures -	____	____
2. Determined which system function was inoperative -	____	____
3. Determined cause of malfunction, using operating and maintenance manual as a guideline -	____	____
4. Reported malfunction to the appropriate person, if necessary -	____	____
5. Logged any action taken on the service log -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual for maintenance and knowledge of the system.

Tools and Equipment:	**Resources:**
equipment with malfunction; service log	See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain to students the necessity of having good preventive maintenace for equipment - relate this to the typewriters and other equipment they use in the classroom. 2. Discuss what can go wrong with equipment. 3. Tell students they will be analyzing equipment to identify cause of malfunction. 4. Use operating and maintenance manual to demonstrate to students how to read it to determine malfunction. 5. Lecture and discuss the types of equipment found in a medical office and the possible malfunctions. a. KKG unit b. typewriter c. telephone answering machine d. transcribing machine e. copying machine f. autoclave 6. Demonstrate how to complete service log. 7. Using a checksheet, have students analyze an assigned piece of equipment. 8. Tell students it is safer and more economical to maintain all equipment in good working order. 9. Observe students analyzing equipment for malfunction.	1. Watch demonstration on how to read operation manual and how to analyze malfunctions. 2. Demonstrate the technique of analyzing a machine for malfunction according to a check sheet. 3. Complete service log for any action taken on the malfunction.

Duty: Maintaining Machines and Office Equipment

Duty No. J

Task No. 2

Task: Perform equipment maintenance functions using appropriate materials to maintain systems operating.

Achievement Indicators: The learner:	Yes	No
1. Determined equipment maintenance functions to be performed -	____	____
2. Assembled tools, materials, and supplies necessary to perform maintenance functions -	____	____
3. Performed maintenance procedures according to manufacturer's specifications -	____	____
4. Returned supplies and/or tools to designated storage area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to manufacturer's specifications and knowledge of system operation.

Tools and Equipment:
maintenance supplies: ribbons; correction ribbons; filters, if appropriate; developer, toner, or other inks or fluids, if appropriate

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain to students the necessity of having good preventive maintenance for equipment - relate this to the typewriters they use in the classroom (and other equipment such as copiers, duplicators, and word processors). 2. Discuss some of the maintenance tasks on a typewriter - such as ribbon change and element change. 3. Tell students they will be performing some of the maintenance tasks on their typewriters and other office equipment they use. 4. Lecture on equipment maintenance - suggested topics of lecture may include: a. operating office equipment properly. b. leaving equipment in correct storage position (external software, inactivate or close movable parts, cover machine). c. cleaning equipment. d. preventive maintenance. 5. Demonstrate how to perform equipment maintenance functions on a machine in the classroom. 6. Assign a maintenance task to students, which might include: a. change ribbon b. change element c. fill equipment with fluid d. dust machine 7. Reinforce the importance of good maintenance. 8. Observe students performing a maintenance task or use a checklist.	1. Attend lecture and demonstrations on equipment maintenance. 2. Perform an assigned maintenance task according to a checklist, if appropriate.

Duty: Maintaining Machines and Office Equipment	**Duty No.** J **Task No.** 3

Task: Repair equipment using appropriate tools to correct malfunction.

Achievement Indicators: The learner:	Yes	No
1. Determined necessary repairs to be performed -	____	____
2. Assembled tools, materials, and supplies necessary to perform repairs to correct malfunction -	____	____
3. Repaired malfunction in equipment according to manufacturer's specifications-	____	____
4. Reported malfunction if unable to repair -	____	____
5. Logged action taken on service log -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to manufacturer's specifications and knowledge of system operation.

Tools and Equipment:	**Resources:**
necessary tools and supplies for minor equipment repairs; service log	See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain to the students that some equipment problems may be repaired.	1. Attend lecture on minor equipment repairs.
2. Tell students that when equipment becomes inoperative attempts should be made to repair it.	2. Demonstrate repair on equipment using a checklist of procedures.
3. Tell students that when a piece of equipment in the classroom becomes inoperative they may attempt to repair it.	
4. Discuss possible repairs and the procedures to be followed in completing the repair.	
5. Using a checklist of procedures, have students demonstrate how a particular repair would be completed.	

Duty: Maintaining Machines and Office Equipment	**Duty No.** J **Task No.** 4

Task: Schedule equipment maintenance using appropriate service to repair malfunctions.

Achievement Indicators: The learner:	Yes	No
1. Selected service agency for equipment maintenance or repair -	____	____
2. Contacted service agency to schedule regular maintenance or for immediate repair equipment -	____	____
3. Arranged for maintenance contract (if appropriate) to set up continued maintenance -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to manufacturer's specifications.

Tools and Equipment:	**Resources:**
telephone, if appropriate; written correspondence materials (letterhead); typewriter, if appropriate	See Bibliography.

Teacher Activities	Student Learning Activities
1. Tell students most repairs are made by people from outside the company - not employees and that a good service contract is necessary.	1. Attend lecture on how to select repair agencies and schedule maintenance or repairs.
2. Point out to students that the classroom typewriters may have a maintenance agreement.	2. Complete simulation on reporting and securing repairs, inventorying equipment, and maintaining a service contract.
3. Lecture on: a. how to select service agencies. b. how to report repairs promptly to appropriate person, if appropriate. c. need to inventory equipment often. d. need to maintain service contract. e. how to schedule regular or necessary maintenance and/or repairs.	
4. Give students a simulation which could involve the scheduling of regular maintenance and/or a necessary repair on a specified piece of equipment.	
5. Evaluate with an objective test.	

Duty: Performing Medical Specialties	**Duty No.** K **Task No.** 1

Task: Maintain medical office library using appropriate documents to provide appropriate reference materials.

Achievement Indicators: The learner: Yes No

1. Selected books, documents, directories, and basic reference resources to be used in the medical office - ____ ____
2. Maintained up-to-date catalogs from manufacturers for ordering equipment and supplies for the medical office - ____ ____
3. Selected biographical and geographical resources to aid in preparing for medical speeches, lectures, reports, articles and books - ____ ____
4. Maintained current medical and other periodicals, magazines, and medical journals - ____ ____
5. Maintained current manuals explaining insurance plans and how to fill out insurance forms - ____ ____
6. Maintained current operation and maintenance manuals on equipment used in the medical office - ____ ____
7. Maintained an up-to-date office procedures manual for the medical office - ____ ____
8. Maintained an up-to-date drug and medicines reference file - ____ ____
9. Maintain an up-to-date list of Medical Associations and Medical Societies; medical examiners' names and addresses; names and addresses of Workmens Compensation Administration Boards and Commissions - ____ ____
10. Maintained current indexes to publications - ____ ____

Criteria:	Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:	**Resources:**
	See Bibliography.

Teacher Activities

1. Ask the following question:
    a. how many students have had the opportunity to visit a medical office library?
2. Find out the students' background prior to beginning of the task.
3. Tell what is to be taught and why it is important.
4. Ask students what past experiences have aided their knowledge.
5. Review the items that should be found in a medical library.
6. Have the student use the skill they have just learned in maintaining an office library.
7. Summarize what has been learned:
    a. how it fits into the total job description.
    b. how it fits with other job tasks or skills.
    c. how it can be transferred to other skills.

Student Learning Activities

1. Observe instruction and/or demonstrations.
2. Become familiar with books, documents, directories and basic reference resources to be used in a medical library.
3. Maintain up-to-date catalogs from manufacturers for ordering equipment and supplies for the office.
4. Select resources to aid in preparing medical speeches, lectures, reports, articles and books.
5. Maintain current medical and other periodicals, magazines, and medical journals.
6. Maintain current manuals explaining insurance plans and how to fill out insurance forms.
7. Maintain current operation and maintenance manuals on equipment used in the medical office.
8. Maintain an up-to-date office procedures manual for the medical office.
9. Maintain an up-to-date drug and medicines reference file.
10. Maintain an up-to-date list of Medical Associations and Medical Societies' medical examiners names and addresses. Names and addresses of Workmen's Compensation Administration Boards and Commissions.
11. Maintain current indexes to publications.

Duty: Performing Medical Specialties	**Duty No.** K
	Task No. 2

Task: Process out-of office studies using appropriate procedures to maintain patient records.

Achievement Indicators: The learner:

	Yes	No
1. Requested and/or arranged for out-of-office tests and studies to be done on patient(s) -	____	____
2. Prepared routing slip(s) for treatments, x-rays, lab tests, to be done out of doctor's office -	____	____
3. Received results of out-of-office studies, tests, x-rays, treatments -	____	____
4. Checked patient file for completeness of studies -	____	____
5. Recorded results of out-of-office studies on patient(s) records according to doctor's instructions -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment: patient files; routing slip(s); request forms for testing	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many students have had the opportunity to arrange out-of-office tests? 2. Find out students' background prior to beginning of task. 3. Tell what is to be taught and why it is important. 4. Ask students what past experiences have aided their knowledge. 5. Using sample forms, show on an overhead projector how to process out-of-office tests and maintain patient records. 6. Have the students use the skill they have just learned to request patient tests, prepare route slip, and maintain the proper records. 7. Summarize what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	1. Observe overhead presentation. 2. Request and arrange out-of-office tests and studies. 3. Prepare routine slip(s) for treatment, x-rays, and lab tests. 4. Receive results of out-of-office tests, x-rays, treatments. 5. Check patient file for completeness of studies. 6. Record results of out-of-office studies on patient's record according to doctor's instructions.

Duty: Performing Medical Specialties

Duty No. K

Task No. 3

Task: Complete medical forms using appropriate information to provide data.

Achievement Indicators: The learner: Yes No

1. Selected appropriate medical form(s) to be completed - ____ ____

   a. patient registration
   b. charge/routing slip
   c. patient permanent record
   d. medical histories
   e. uniform claim form
   f. commercial insurance forms
   g. disability forms
   h. workmen's compensation
   i. surgical records
   j. informed consent forms
   k. appointment scheduling forms
   l. certificates
   m. legal forms
   n. pegboard forms
   o. accounting forms
   p. financial forms
   q. fee schedules
   r. telephone forms
   s. order forms
   t. inventory forms

2. Determined appropriate information to be recorded on proper form - ____ ____

3. Recorded appropriate information on the correct form - ____ ____

4. Verified correctness of information recorded before submitting form to be processed - ____ ____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:

appropriate medical forms

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Review the many different forms to be filled out by the student.	1. Receive instruction on how to fill out forms.
2. Find out students' background prior to beginning of task.	2. Determine the appropriate information to be recorded on proper forms.
3. Tell what is to be taught and why it is important.	3. Record information on appropriate form.
4. Ask students what past experiences have aided their knowledge.	4. Verify correctness of information recorded before submitting the form to be processed.
5. Use samples of the different forms and explain how the different forms are used/filled out. 6. Have the student use the skill they have just learned to fill out selected forms. 7. Summarize what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	Appropriate medical form(s) to be completed: patient registration charge/routine slip patient permanent record medical histories uniform claim form commercial insurance form disability forms workmen's compensation form surgical records informed consent forms appointment scheduling forms certificates legal forms pegboard forms accounting forms financial forms fee schedules telephone message forms order forms inventory forms

Duty: Performing Medical Specialties	**Duty No.** K	
	Task No. 4	

Task: Prepare medical reports using appropriate information to provide data.

Achievement Indicators: The learner:	Yes	No
1. Determined purpose of medical or professional report to be completed -	____	____
2. Researched and collected data necessary to complete report -	____	____
3. Prepared brief outline of report, if appropriate -	____	____
4. Prepared rough draft of report, if appropriate -	____	____
5. Proofread and made corrections and revisions -	____	____
6. Drafted final copy (typed or wrote neatly and accurately) -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:	**Resources:**
data to prepare report; typewriter or word processor	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following question: a. how many students have ever researched a medical report?	1. Learn steps necessary to prepare a report.
2. Find out students' background prior to beginning of task.	2. Determine the purpose of the medical report to be completed.
3. Tell what is to be taught and why it is important.	3. Research and collect data.
4. Ask students what past experiences have aided in their knowledge of preparing reports.	4. Prepare outline (if appropriate).
5. Present the steps necessary to prepare a medical report.	5. Prepare a rough draft (if appropriate).
6. Have students use the skill they learned to collect data and prepare medical report(s).	6. Draft final copy -- typed/written neatly and accurately.
7. Summarize what has been learned: a. how it fits into the total job description. b. how it fits with other job tasks or skills. c. how it can be transferred to other skills.	7. Proofread for accuracy.

Duty: Supervising and Training	**Duty No.** L **Task No.** 1

Task: Interview applicants using appropriate forms to ascertain employability.

Achievement Indicators: The learner:

	Yes	No
1. Selected forms to be used for personnel selection (application forms, evaluation forms) -	____	____
2. Arranged for interview with applicant -	____	____
3. Greeted applicant and made applicant feel at ease -	____	____
4. Reviewed job application (or had applicant fill one out), if appropriate -	____	____
5. Reviewed resume, if appropriate -	____	____
6. Conducted interview using list of questions and/or evaluation sheet, if appropriate -	____	____
7. Arranged with applicant for interview follow-up, if appropriate-	____	____
8. Ended interview courteously and professionally -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards and all applicable Federal and State laws.

Tools and Equipment: forms: application blank(s), letter of application, data sheet (resume); list of interview questions and/or evaluation sheet	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Reivew current legislation concerning creation and maintenance of personnel records, which may include: information on race, height, weight, previous employers, marital status, sex, etc.	1. Listen to the discussion and be given an opportunity to examine copies of any current legislation.
2. Review the forms on which personnel records are to be kept.	2. Look at already completed evaluation forms of people who have been interviewed.
3. Review the information that should be recorded on personnel records and make sure that they are in line with current legislation.	3. Listen to the discussion on proper techniques for interviewing.
4. Overview current legislation, proper forms and information to record on the forms.	4. Complete practice personnel forms with fictional data to include some information to be updated (application blanks, etc.)
5. Assign role-playing exercises or taping exercises on interviewing and filling out personnel records and interview evaluation forms.	5. Complete assignment on role-playing and/or taping interview(s).
6. Assign exercise for practice of follow-up techniques.	6. Complete exercise to practice follow-up techniques.
7. Summarize how improperly recorded information can result in problems for the employer and the legal responsibility of the employer as well as loss of job for the employee.	

Duty: Supervising and Training	**Duty No.** L
	Task No. 2

Task: Maintain personnel records using appropriate forms to ensure accurate data.

Achievement Indicators: The learner:	Yes	No
1. Familiarized self with current legislation concerning maintenance of personnel records -	____	____
2. Selected proper forms to be used to keep personnel records -	____	____
3. Determined data to be recorded on personnel forms to conform with current legislation -	____	____
4. Recorded data on personnel forms and/or records either manually or mechanically -	____	____
5. Updates personnel records as necessary in keeping with current legislation -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards and current legislation.

Tools and Equipment:	**Resources:**
copies of current legislation on personnel records; copies of currently used personnel forms	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review the proper forms used in personnel selection and present examples of those forms.	1. Listen to the discussion and examine the sample personnel forms.
2. Overview the importance of personnel record selection and some of the pitfalls of current legislation.	2. Listen to the discussion on personnel form maintenance and current legislation.
3. Demonstrate proper methods of arranging for interviewing to update personnel records.	3. Observe demonstration by teacher or another student on how to maintain personnel records.
4. Demonstrate proper methods of greeting employee and making him/her feel at ease for the session.	4. Observe demonstration by teacher or another student on how to update personnel records.
5. Review key areas of job performance that should be reviewed with employee.	5. Perform all aspects of the interview process through role-playing to update personnel records.
6. Discuss steps necessary to properly record information collected from employee on personnel record.	
7. Summarize the need to have all aspects of the interview and update session flow smoothly.	
8. Demonstrate proper method of ending the interview and making employee feel it was worthwhile.	
9. Assign role-playing to practice all aspects of updating personnel records.	

Duty: Supervising and Training

Duty No. L

Task No. 3

Task: Maintain policy/procedures manual using appropriate information to establish operating guidelines.

Achievement Indicators: The learner:

	Yes	No
1. Determined form and format of policy/procedures manual -	____	____
2. Determined subjects to be included in manual -	____	____
3. Determined headings/title pages to be used for various sections of manual -	____	____
4. Typed or wrote a rough draft of each item to be included, if appropriate -	____	____
5. Corrected and revised all items to be included -	____	____
6. Typed final copies to be included making all corrections and revisions noted on rough draft copy -	____	____
7. Assembled policy/procedures manual and/or arranged in proper sequence according to planned format -	____	____
8. Bound manual together in appropriate manner -	____	____
9. Updated manual as necessary -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:	**Resources:**
samples of actual policy/procedures manuals; binding material (notebook, staples); bond paper; typewriter or word processor; correction material	See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask the following questions: a. what is the purpose of a policy/procedures manual? b. what are some possible subject areas of policy/procedures manual? c. what are some possible covering or binding methods?	1. Listen to questions and supply possible answers to questions.
2. Discuss the purpose of a policy/procedures manual.	2. Listen to discussion and views samples of actual policy/procedures manuals.
3. Using samples of actual policy/procedures manuals, discuss the subject areas/headings that may be found in a policy/procedures manual and their order. They may include: a. title page b. table of contents c. directories d. resource lists	3. Prepare outline and/or rough copies of items to be included in policy/procedures manual.
4. Discuss binding possibilities.	4. Correct and revise all items before making final copies.
5. Allow students to type a policy/procedures manual including a sample page of each section deemed necessary as determined by instructor. They may include: a. title page b. table of contents c. introduction d. employee benefits e. safety/emergency procedures f. guidelines for business trips and expense reports g. formats for medical documents h. examples of insurance forms i. fee schedules j. procedures for using pegboard and for billing patients k. procedures for making, changing, and cancelling appointments	5. From rough draft copies of a policy/procedures manual, type a final corrected copy, assemble the pages in proper order and bind it as directed by the instructor.

Duty: Supervising and Training

Duty No. L

Task No. 4

Task: Orient new employees using training materials to familiarize employees with procedures and equipment.

Achievement Indicators: The learner:

	Yes	No
1. Determined purpose of training/orientation -	____	____
2. Planned method/technique to be used for training/orientation -	____	____
3. Notified new employees involved of date(s) and time(s) training/orientation would take place -	____	____
4. Made arrangements for location to be used for session(s) -	____	____
5. Prepared necessary equipment and/or materials and supplies needed to conduct the training/orientation -	____	____
6. Carried out planned training/orientation procedures -	____	____
7. Evaluated results of training/orientation -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:
overhead projector; training materials and supplies; procedures manual

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss the purpose of training/orientation and the various methods that might be used. 2. Discuss the various means of notifying employees: memorandum, invitation card, company newsletter, etc. 3. Discuss need to have adequate room, table arrangements, lighting, etc. 4. Discuss the use of audio-visuals, handouts and supplies that might be needed. 5. Discuss how to develop a plan for a training session. 6. Discuss various evaluation tools and the importance of doing an evaluation. 7. Discuss or demonstrate how to implement the training/orientation program plan. 8. Have student develop a training plan and implement it by role-playing with other students in the class. 9. Have students critique and evaluate each others plans and how they implement it.	1. Listen to all discussions on how to plan, conduct, and evaluate a training/orientation session. 2. Develop a plan to implement a training session for new employees including the following: a. the date and time to hold the session b. how to inform employees of the training session c. where the session will be held d. the activities that will take place e. all audio/visuals, equipment, possible handouts and supplies to be used f. the means of evaluation 3. Implement the plan developed using other students in the class as new employees. 4. Critique and evaluate other students' plans and how they were implemented.

Duty: Supervising and Training	**Duty No.** L
	Task No. 5

Task: Establish employee performance measurements using appropriate guidelines to ensure production schedules are met.

Achievement Indicators: The learner:

	Yes	No
1. Listed tasks and other procedures that are regularly completed in the medical office -	____	____
2. Used priority list to set up a production schedule of tasks and procedures to be completed -	____	____
3. Developed performance measurements for each task or procedure listed on the production schedule -	____	____
4. Kept accurate logs of employees' work performance on tasks and procedures, if appropriate -	____	____
5. Followed up on evaluating each employee's work record to assure that production schedules were being met -	____	____
6. Took appropriate measures when work of an employee was not meeting the established standards -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the employer's standards.

Tools and Equipment:	**Resources:**
work performance log, if appropriate	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review what tasks in the medical office might be done on a daily or regular basis: a. answering the phone/appointments b. posting payments c. making photocopies d. completing insurance forms for billing e. typing letters, etc. 2. Discuss the above tasks importance and where they should go on a priority listing, also, how often they are performed. 3. Discuss daily tasks and how well they should be done to be considered useable. Example: Posting payments should be done with 100% accuracy. 4. Discuss how to develop a log (check sheet) where a record could be kept on how well a task has been done (perhaps to be used when evaluating the employee and to see what tasks were actually being performed). 5. Discuss how to approach an employee who is not performing to established standards and do it in a tactful manner. 6. Have students keep a log of various tasks performed for a period of time on one fellow student (who will serve as a "new employee"). 7. Have student role-play an evaluation session for a new employee who has not performed up to standards. (This may be taped, if desired, and critiqued by other students.)	1. Participate in discussions on what tasks are performed in a medical office, how often they are performed, how to prioritize the tasks, how to develop a log or evaluation instrument and how to approach employees who are not performing up to established standards. 2. Keep a log of tasks completed by a fellow student (new employee) for a certain period of time. 3. Role-play an evaluation session for a "new employee" who has not performed up to established standards (tape this, if appropriate, and have it critiqued by rest of class).

Duty: Supervising and Training	**Duty No.** L
	Task No. 6

Task: Establish staffing patterns and schedule staff using knowledge of production needs.

Achievement Indicators: The learner:

	Yes	No
1. Established staffing patterns to achieve maximum productivity -	____	____
2. Scheduled staff to achieve maximum utilization of facilities -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the employer's standards.

Tools and Equipment:	**Resources:**
	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review organizational charts and how they help decide job duties.	1. Listen to review and respond to questions.
2. Discuss how to determine the number of employees needed based upon the number of job tasks to be performed.	2. Participate in discussions on staffing and maximum use of office facilities.
3. Discuss office space, to decide how many employees could be accommodated in the office.	3. Complete story problems or fictional situations by indicating the staffing needs in accordance with the tasks to be performed and the space available in the office.
4. Discuss how to balance the office space with the tasks to be performed and the number of employees needed.	
5. Allow students an opportunity to make some staffing decision by giving them story problems and/or fictional situations.	

Duty: Supervising and Training	**Duty No.** L
	Task No. 7

Task: Schedule work assignments using knowledge or priorities to complete task.

Achievement Indicators: The learner:	Yes	No
1. Established current set of priorities for all work assignments -	____	____
2. Scheduled work assignment for each employee according to established priorities -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:	**Resources:**
	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review how to set priorities based upon the importance of the task, how often it is performed and the best time to perform it.	1. Listen to review and respond to any questions on setting priorities and assigning tasks to employees.
2. Allow the students to use previously learned information on setting priorities and scheduling assignments to actually take a list of tasks and prioritize them and assign tasks to a given number of employees in an office for a specified period of time, i.e., one day or one week.	2. Take a list of tasks and prioritize them according to how often they are performed and how important it is they be completed.
	3. Assign these tasks to the employees in a particular office (number of employees, period of time, and office conditions are to be determined by the instructor).

Teacher Activities	Student Learning Activities
1. Provide resources and references for this task.	1. Read assigned resources and references related to this task.
2. Present a lecture discussion which may include: a. principles of medical asepsis b. methods of contamination c. methods of microbial control d. importance of proper handwashing	2. Attend a lecture/discussion related to this task.
3. Prepare charts demonstrating methods of disease transmission.	3. Attend a demonstration of this task.
4. Show and discuss audio-visual materials on handwashing.	4. View audiovisual materials related to this task.
5. Demonstrate proper procedure for handwashing.	5. Demonstrate ways by which organisms spread: equipment to worker patient to patient worker to worker worker to patient
6. Make puzzle to reinforce use of vocabulary on asepsis.	6. Demonstrate handwashing technique satisfactorily for an evaluator.
7. Evaluate student on proper handwashing techniques using the achievement indicators as a guide.	7. Demonstrate proficiency on a quiz related to this task.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 1

Task: Perform aseptic handwashing techniques using appropriate materials to clean hands.

Achievement Indicators: The learner:	Yes	No
1. Assembled equipment -	____	____
2. Performed handwashing procedure in prescribed manner -	____	____
3. Left handwashing area neat and clean -	____	____

Criteria: Competence in the task will be recognized when hands are cleaned according to the procedures in the training program or institution and the achievement indicators listed.

Tools and Equipment:
liquid soap (preferably dispenser); papertowels/dispenser; wastepaper basket; orange stick; sink (foot, knee, or hand control); bar soap

Resources:
See Bibliography.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 2

Task: Open a sterile tray cover and remove sterile barrier.

Achievement Indicators: The learner:	Yes	No
1. Washed hands -	____	____
2. Obtained sterile wrapped package -	____	____
3. Checked exterior sterilization tape for processing and expiration date -	____	____
4. Placed wrapped package on a clean, dry table -	____	____
5. Loosened and removed fastener on package and discarded it -	____	____
6. Opened the first flap away from the body and handled only the outside of the wrapper -	____	____
7. Opened left and right flaps without crossing over the sterile field -	____	____
8. Opened flap closest to the body by lifting it towards them -	____	____
9. Kept sterile field within their vision at all times -	____	____
10. Checked interior sterilization indicator for sterility -- if not sterile, obtained a new tray and repeated steps 1-9 -	____	____
11. Maintained sterile field by not reaching, talking, or sneezing over the field -	____	____
12. Covered the sterile tray		
a. Opened a sterile barrier or removed a sterile towel from its container using a sterile transfer forcep -	____	____
b. Grasped a corner of the barrier or towel and opened being careful not to contaminate it -	____	____
c. Grasped a second corner, placed the bottom edge near the closest edge of the sterile tray, and layed the cover down and away from them -	____	____

	Yes	No
13. Removed the sterile barrier		
a. Reached across the covered field -	____	____
b. Grasped the corners -	____	____
c. Lifted the corners towards them -	____	____

Criteria: Competence will be demonstrated when the student opens a sterile tray, covers and removes a sterile barrier, according to the performance guide as determined by the instructor.

Tools and Equipment:

sterile wrapped package, sterile barrier or container with sterile towel and lifting forceps

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare tests.	1. Obtain module.
2. Assemble equipment.	2. Read assigned text.
3. Provide filmstrip.	3. View filmstrip.
4. Demonstrate procedure.	4. Observe demonstration.
5. Have students practice in work groups.	5. Practice in a student group - evaluating each other's performance.
6. Evaluate student performance.	6. Demonstrate competency for instructor.
7. Administer post test.	7. Take post test.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 3
Task: Disinfect instruments (chemical).	

Achievement Indicators: The learner:

	Yes	No
1. Collected sanitized instruments to be disinfected -	____	____
2. Opened hinged or jointed instruments and disassembled if necessary -	____	____
3. Disinfected by chemicals:		
a. Read instructions for disinfectant solution -	____	____
b. Prepared solution, filling pan 3/4 full -	____	____
c. Placed clean and dry instruments into solution -	____	____
d. Checked to make sure that all parts of each instrument were immersed in the solution -	____	____
e. Closed lid on pan and began timing -	____	____
f. Soaked in disinfectant the required amount of time -	____	____
g. If instruments were to remain in solution until needed, used an anti-rust solution to disinfect -	____	____
h. Removed the instruments with sterile transfer force for:		
(1) Clean usage: rinsed with water, dried with a clean towel and placed in a covered container or clean drawer-	____	____
(2) Sterile usage: rinsed with sterile water and placed on a padded sterile field or dried on a sterile towel and placed on a sterile pad -	____	____
i. Cleaned up the work area -	____	____

Continued...

Criteria: Competence will be demonstrated when the student chemically disinfects instruments for clean and sterile usage according to the performance guide as determined by the instructor.

Tools and Equipment:

Disinfectants (anti-rust); collection of instruments; container large enough to hold instruments; sterile towels or a sterile barrier; sterile gauze square for padding; Mayo stand or clean table area; container of sterile towels; transfer forceps in container with dated anti-rust disinfectant; sterile water; clean covered container or a clean cupboard area for storage

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Read assignments.
3. Discuss the basic principles.	3. Observe and participate in class discussion and demonstration.
4. Demonstrate procedure.	4. Practice procedure.
5. Supervise student practice (assign them to work groups).	5. Have instructor evaluate you.
6. Evaluate student.	6. Take post test.
7. Give post test over principles.	

Duty: Performing Clinical Tasks

Duty No. M

Task No. 4

Task: Clean and restock examination room.

Achievement Indicators: The learner:

	Yes	No
1. Discarded disposable linens in covered container -	____	____
2. Removed used instruments and placed them in dirty utility room for cleaning -	____	____
3. Discarded dressings in paper and placed them in covered receptacle -	____	____
4. Damp dusted examination table and furniture using cloth dipped in disinfectant solution -	____	____
5. Cleaned sink -	____	____
6. Replaced supplies as needed -	____	____
7. Changed all solutions at scheduled intervals in containers (lifting forceps) and labeled with date and initials -	____	____
8. Washed hands -	____	____

Criteria: Competency will be demonstrated when the student can clean and restock an examination room without containinating uniform, according to the performance guide as determined by the instructor.

Tools and Equipment:

Covered receptacle; examination equipment and disposable linen; disinfectants for table and sink; paper toweling (damp dusting cloths); supplies to restock; lifting forceps; antiseptic anti-rust solution; tape; pen

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare a student assignment list for cleaning and restocking lab.	1. Secure your duty and equipment list for week of assignment.
2. Prepare a check list of duties and equipment for the student to follow.	2. Check and complete all areas daily.
3. Evaluate performance after completion of weekly duty.	3. Have instructor evaluate your performance after your assigned time is completed.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 5

Task: Wrap instruments for sterilization.

Achievement Indicators:

The learner:	Yes	No
1. Assembled wrapping supplies -		
2. Assembled and sorted cleaned and dried instruments -		
3. Inspected instruments for defects -		
4. Opened jaws on instruments -		
5. Inserted instrument and sterilization indicator into bag, or envelope or wrapper -		
6. Sealed package and applied indicator tape -		
7. Labeled and dated package -		

Criteria: Competency will be demonstrated when the student can wrap instrument, according to the performance guide as determined by the instructor.

Tools and Equipment:

Wrapping supplies- wrappers, envelopes, sterilizing tape, sterilizing indicators, assortment of instruments.

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Observe demonstration.
3. Demonstrate procedure.	3. Collect supplies.
4. Assist with student practice.	4. Practice wrapping a variety of instruments.
5. Evaluate students.	5. Label each with its' proper name.
6. This is a good area to teach the names of the instruments being wrapped.	6. Have instructor evaluate.
	7. Take a post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 6

Task: Unwrap or open sterile packages and maintain sterility of the contents.

Achievement Indicators: The learner:

	Yes	No
1. Washed hands -		
2. Obtained a sterile package -		
3. Checked the exterior sterilization date and tape -		
4. Opened the wrapped package:		
a. held the package in the left hand or placed it on a hard, clean surface -		
b. removed the tape -		
c. lifted the top section of the wrapper back and let if fall to the distal side -		
d. grasped the corners of the left and right -		
e. grasped the remaining corner flap and lifted it to complete opening the package -		
5. Removed the contents:		
a. hand held method- held the corners ot the sterile wrap with one hand, prevented them from falling over the sterile contents, dropped the contents onto a sterile field or handed it to a person with sterile gloves on -		
b. hard surface method- removed the contents by using a sterile transfer forcep and dropped it onto a sterile field or handed it to a person with sterile gloves on -		
6. Opened a sealed package:		
a. read the package directions -		
b. pulled the package open, according to the directions-		
c. exposed the contents without contaminating it -		
d. removed the contents as described in #5 above -		

Continued...

7. Maintained the sterile field by:

	Yes	No
a. facing the open sterile contents at all times -	____	____
b. controlling coughing, talking or reaching over it -	____	____
c. closing open breezy windows or doors -	____	____
d. handling linens without unnecessary shaking -	____	____
e. moving sterile tray from underneath or sides -	____	____

Criteria: Competency will be demonstrated when the student unwraps or opens sterile packages and maintains the sterile contents according to the performance guides as determined by the instructor.

Tools and Equipment:

Small sterile package (sealed type); sterile package (wrapped type); sterile gloves; transfer forcep; larger sterile field; Mayo stand.

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Read assignments.
3. Demonstrate procedure -stress "sterile conscience" and basic principles.	3. View demonstration.
4. Assign work groups for practice.	4. Participate in discussion.
5. Supervise student practice.	5. Practice and evaluate other students in your work group.
6. Evaluate students.	6. Have instructor evaluate your performance.
7. Give post test.	7. Take a post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 7

Task: Sterilize supplies using the dry heat method.

Achievement Indicators: The learner: Yes No

1. Assembled prepared packages:
   a. instruments - ____ ____
   b. rubber supplies - ____ ____
2. Separated packaged supplies according to materials which should be sterilized together - ____ ____
3. Prepared autoclave - ____ ____
4. Arranged items on autoclave tray for maixmum flow of heat around items, and loaded chamber - ____ ____
5. Closed and locked autoclave door - ____ ____
6. Set timer and temperature gauge for prescribed time and temperature according to type of materials autoclaved - ____ ____
7. Opened the autoclave door to cool - ____ ____
8. Stored supplies in a clean dry place - ____ ____
9. Observed safety precautions in using autoclave - ____ ____

Criteria: Competency will be demonstrated when the student operates the dry heat autoclave using a variety of packaged supplies, according to the performance guides and manufacturers' instruction manual as determined by the instructor.

Tools and Equipment:

Autoclave; instruction manual; packaged supplies (instruments, rubber supplies, powder packets).

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Read assignments.
3. Stress safety measures.	3. Observe demonstration.
4. Assign students to work groups and have one group daily learn and practice procedure on their own, with assistance if needed.	4. Practice procedure.
5. Evaluate student--due to time element, it is best to have a simulation of the procedure without a total process.	5. Be prepared to go through a simulated sterilization for the instructor.
6. To save time, check student off for dry heat and steam at the same time.	6. Take a post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 8.

Task: Sanitize instruments.

Achievement Indicators: The learner: Yes No

1. Assembled soiled instruments, basin and blood dissolving detergent in dirty utility area - ____ ____
2. Prepared detergent solution as per bottle directions or directed by instructor - ____ ____
3. Carefully removed knife blades from scalpel with a hemostat and discard into contaminated container box - ____ ____
4. Opened forceps and all hinged instruments - ____ ____
5. Rinsed instruments under cold running water - ____ ____
6. Placed in detergent solution - ____ ____
7. Scrubbed jaws, hinged areas, and grasping end of individual instruments with a brush - ____ ____
8. Avoided splashing and spraying - ____ ____
9. Rinsed well and dried with clean towel - ____ ____
10. Placed in a clean area for sterilization or wrapping - ____ ____

Criteria: Competence will be recognized when the student sanitizes soiled instruments using a detergent solution, opening or dismanteling them, rinsing, scrubbing, rinsing, and drying them according to the achievement indicators.

Tools and Equipment:

Green soap; blood dissolving detergent; basin; brushes, (hand and syringe); scalpel with knife blade; hemostat; assortment of small instruments-glass syringe, clean dry towels, plastic apron (optional).

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module, evaluation tests.	1. Obtain module.
2. Assemble equipment.	2. Read assigned material.
3. Demonstrate instrument cleansing (assign 2 students to teach unit using text and your assistance). Purpose: To encourage organization of thoughts in a teaching situation, practice communication skills and develop confidence before a group.	3. View demonstration.
4. Observe student practice and assist teaching students in evaluation.	4. Practice sanitization procedures on equipment provided.
5. Provide post test.	5. Demonstrate competency for evaluator.
	6. Take post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 9

Task: Sterilize supplies and instruments using the autoclave (moist heat with pressure method).

Achievement Indicators:

The learner:	Yes	No
1. Assembled packaged supplies and determined whether materials could be steam-pressure autoclaved without damage -		
2. Separated packaged items according to materials to be sterilized together -		
3. Arranged items on tray to allow for maximum heat circulation and loaded chamber -		
4. Checked the reservoir for distilled water and filled if necessary -		
5. Checked chamber for correct water level -		
6. Obtained correct pressure and temperature -		
7. Set timer -		
8. Vented the steam, according to directions -		
9. Opened the door for 15-20 minutes or until items were dry -		
10. Unloaded autoclave with clean, dry hands -		
11. Stored articles in a clean, dust-proof area -		
12. Maintained appropriate daily care of the autoclave according to the manual -		
13. Observed safety precautions as indicated on the autoclave -		

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Criteria: Competence will be recognized when the student is able to sterilize supplies and instruments using the autoclave according to the achievement indicators and instructor's guidelines.

Tools and Equipment:

Autoclave with instruction manual; distilled water; assorted wrapped supplies-glass, rubber, metal, linen, cotton balls; unwrapped containers.

Resources:

See Bibliography.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 10

Task: Pour a sterile solution.

Achievement Indicators:

The learner:	Yes	No
1. Opened a sterile container or a sterile field to receive antiseptic -		
2. Read the label -		
3. Checked the expiration date -		
4. Removed cap and placed it on table with the open end facing up -		
5. Palmed the label -		
6. Poured a small amount of liquid out to rinse lip -		
7. Poured solution into sterile container -		
8. Did not touch bottle to sterile container -		
9. Did not splash solution onto sterile field -		
10. Replaced cap without touching inside cap or bottle top -		
11. Read label when solution returned -		

Criteria: Competency will be recognized when the student is able to pour a sterile solution into a container on a sterile field according to the achievement indicators.

Tools and Equipment:

Sterile field with a container for liquid; antiseptic; clean, dry area for sterile field.

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module and evaluation sheet.	1. Read module and assigned readings.
2. Assemble a sterile field and an antiseptic.	2. Observe demonstration by instructor.
3. Demonstrate technique.	3. Assemble equipment.
4. Evaluate student performance.	4. Practice task.
	5. Have instructor evaluate you.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 11

Task: Apply sterile gloves.

Achievement Indicators: The learner:

	Yes	No
1. Washed hands -	____	____
2. Prepared a clean, flat surface for opening gloves -	____	____
3. Opened sterile glove package without contaminating -	____	____
4. Picked up first glove on the inside part of the cuff -	____	____
5. Pulled the glove on without contaminating outside of glove -	____	____
6. Picked up the second glove by slipping the sterile glove fingers under the cuff of the second glove -	____	____
7. Pulled the second glove on without touching the uncovered hand -	____	____
8. Adjusted gloves as needed -	____	____
9. Removed first glove by grasping the outside of glove by the other gloved hand and pulled it off turning it inside out -	____	____
10. Removed the second glove by placing bare hand inside cuff of glove and pulled it off, turning it inside out -	____	____

Criteria: Competency will be recognized when the student is able to put on sterile gloves without contamination and remove them according to the achievement indicators and as determined by the instructor.

Tools and Equipment:

Sterile gloves; handwashing supplies; powder.

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble sterile gloves for each student.	2. Read assigned material.
3. Demonstrate procedure.	3. Observe demonstration.
4. Review principles.	4. Practice.
5. Have students practice.	5. Powder and re-pack gloves when finished.
6. Evaluate students.	6. Have instructor evaluate.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 12

Task: Using sterile transfer forceps.

Achievement Indicators: The learner: Yes No

1. Washed hands - _____ _____
2. Prepared sterile field - _____ _____
3. Opened sterile packages (instruments should still be covered by inner flap) - _____ _____
4. Placed containers in close proximity to the field - _____ _____
5. Grasped the transfer forceps by the handles and lifted them vertically without touching the inside of the container - _____ _____
6. Kept the prongs of the forceps held downward - _____ _____
7. Allowed the excess solution to drain back into the container - _____ _____
8. Removed sterile objects by lifting from package with the forceps - _____ _____
9. Placed sterile objects in the center of the sterile field- _____ _____
10. Opened container with the free hand (lid must be held face down) - _____ _____
11. Removed cotton balls or gauze from container using the forceps - _____ _____
12. Placed cotton balls or gauze near the center of the sterile field - _____ _____
13. Replaced lid onto the container - _____ _____
14. Replaced transfer forceps in container with jaws open - _____ _____
15. Dropped all objects onto sterile field without prongs touching the field - _____ _____

Continued...

Criteria: Competence will be recognized when the student demonstrates placing sterile objects on a sterile field using transfer forceps without contaminating the field or the transfer forceps.

Tools and Equipment: Transfer forceps and container; sterile instruments; sterile cotton balls in a container; sterile gauze in a container or package; sterile towels/tray; hand washing equipment.	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post tests.	1. Read and complete pre/post tests.
2. Prepare modules on sterile technique.	2. Read modules.
3. Provide textbooks.	3. Read textbooks.
4. Show filmstrip on sterile technique.	4. Attend movies on sterile techniques.
5. Give demonstration.	5. Attend lectures and teacher's demonstration.
6. Give lecture and discussion.	6. Practice handling sterile instruments.
7. Evaluate student's demonstration.	7. Demonstrate skill for the instructor for evaluation.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 13

Task: Support an ambulating client using a knowledge of proper body mechanics and appropriate equipment to maintain physical safety of self and client.

Achievement Indicators:

The learner:	Yes	No
1. Assembled equipment needed to support client during ambulation if needed -	____	____
2. Identified client -	____	____
3. Explained procedure for ambulation to assure cooperation of the client -	____	____
4. Ambulated client in prescribed manner -	____	____
5. Positioned client and equipment to assure comfort and safety -	____	____
6. Recorded/reported any pertinent observations per institutional policy -	____	____
7. Washed hands after procedure -	____	____

Criteria: Competence in the task will be recognized when the student ambulates the client using proper body mechanics.

Tools and Equipment:

Transfer belt; chair or bed to seat client; trainex 8-track projector or cassette player and filmstrip projector; walker; cruthces; cane.

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide resources and references related to the task.	1. Read assigned resources and references on ambulation of a client.
2. Set-up and present audio-visual materials related to this task.	2. View audio-visual material related to this task.
3. Demonstrate the task for the class using one or more of the following situations: a. a client using a cane b. a client using a walker c. a client using crutches d. a client who is weak on one side	3. View classroom demonstration of task by instructor.
4. Work in small groups of three to critique performance of the task during practice.	4. Practice demonstration for teacher to observe and evaluate.
5. Give and explain what information is pertinent to observe in ambulating client.	5. Observe and record any observations of client.
6. Give the students a quiz related to this task and evaluate the results.	6. Demonstrate proficiency on a quiz related to this task.
7. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	7. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 14

Task: Pull a client to a standing position using a knowledge of proper body mechanics and appropriate equipment to maintain the physical safety of self and client.

Achievement Indicators: The learner:

	Yes	No
1. Identified client -	____	____
2. Explained procedure to assure client cooperation -	____	____
3. Sat client upright to assess for an untoward reaction -	____	____
4. Stood client in prescribed manner using proper body mechanics -	____	____
5. Observed client for an untoward reaction -	____	____
6. Washed hands before and after procedure -	____	____

Criteria: Competence in the task will be recognized when a client is pulled to a standing position according to the guidelines of the training program and/or institution and the achievement indicators listed.

Tools and Equipment:	**Resources:**
Chair; proper equipment for showing audio-visual materials; trainex machine or filmstrip projector.	See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide resources and references related to the task.	1. Read assigned resources and references on moving a client to a standing position.
2. Use and explain the importance of body mechanics in this task.	2. View audio-visual materials related to this task.
3. Use varying levels of a client's capability to demonstrate task.	3. Observe a demonstration of task by instructor.
4. Work in small groups of three where students critique the performance of the task by another.	4. Practice demonstration of task with peer for teacher to observe and critique.
5. Explain what information is pertinent to observe in standing a client.	5. Observe and record client's reaction when sitting and standing.
6. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	6. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 15

Task: Operate a wheelchair using a knowledge of physics and the equipment and proper body mechanics to transport a client from one location to another.

Achievement Indicators: The learner:	Yes	No
1. Adjusted equipment on wheelchair to assure client comfort and safety -	____	____
2. Pushed wheelchair in prescribed manner to area desired -	____	____
3. Locked wheelchair in place when destination was reached -	____	____

Criteria: Competence in the task will be recognized when a client is transported from one location to another by operating a wheelchair according to the institution's guidelines and the achievement indicators listed.

Tools and Equipment:	**Resources:**
Audio-visual materials; wheelchair.	See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide resources and references related to this task	1. Read assigned resources and references related to this task.
2. Set-up and present audio-visual materials related to this task.	2. View audio-visual material on transfer activities.
3. Demonstrate task stressing the use of proper body mechanics.	3. Attend demonstration of task.
4. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	4. Practice task.
	5. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 16

Task: Administer spirits of ammonia using an available source to revive a faint client.

Achievement Indicators:

The learner:	Yes	No
1. Observed signs of faintness in a client -	____	____
2. Obtained spirits of ammonia -	____	____
3. Administered the spirits of ammonia in prescribed manner -	____	____
4. Observed for signs of recovery from faintness -	____	____

Criteria: Competence in the task will be recognized when spirits of ammonia are administered to a faint client in an actual or simulated situation according to the guidelines of the manufacturer and the achievement indicators listed.

Tools and Equipment:
Ammonia Inhalant.

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide the module or written materials (references and resources) which define the signs and symptoms usually preceeding or accompanied by fainting.	1. List/verbalize the signs and symptoms usually presenting or accompanied by fainting.
2. Provide the module or references and resources which define the procedures for treating a fainting client by use of an ammonia inhalant.	2. Demonstrate the use of the ammonia inhalant.
3. Demonstrate reviving a client who has fainted using spirits of ammonia.	3. List/verbalize the signs of recovery from faintness.
4. Give the students a quiz related to this task and evaluate the results.	4. Demonstrate proficiency on a quiz related to this task.
5. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	5. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 17

Task: Position a faint client using a knowledge of the nervous and cardiovascular systems to revive the client's full consciousness.

Achievement Indicators:

The learner:	Yes	No
1. Observed signs of faintness in a client -	____	____
2. Seated client with head between knees and had client lie down with legs elevated -	____	____
3. Loosened clothing at neck and waist -	____	____
4. Observed for signs of recovery from faintness -	____	____

Criteria: Competence in the task will be recognized when a faint client is positioned correctly to promote full consciousness in an actual or simulated situation according to the training program, Red Cross, and/or institution and the achievement indicators listed.

Tools and Equipment:

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide resources and references related to this task.	1. List/verbalize the signs and symptoms associated with fainting.
2. Present a lecture/discussion which may include: a. anatomy and physiology of nervous and cardiovascular systems as they relate to fainting. b. signs and symptoms which preceed and/or accompany fainting.	2. Position a faint client, to revive the client to full consciousness.
3. Demonstrate the positions to which a faint client is moved to revive the client to full consciousness.	3. Demonstrate the knowledge of the actions of the nervous and cardiovascular system on fainting on a written or oral quiz.
4. Develop/administer a written or oral quiz which tests the actions of the nervous and cardiovascular systems during fainting.	4. List/verbalize the signs and symptoms indicating recovery from faintness.
5. Evaluate a student's demonstration of the task using indicators as a guide.	5. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 18

Task: Treat a burn using appropriate materials and a knowledge of the integumentary system and surgical aseptic technique to prevent further trauma and infection.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands before and after procedure if possible -	____	____
2. Identified location, classification, and extent of burn -	____	____
3. Assembled equipment and materials -	____	____
4. Treated burn in prescribed manner using proper asceptic technique -	____	____
5. Positioned client and equipment to assure comfort and safety of client -	____	____

Criteria: Competence in the task will be recognized when a burn is treated according to the guidelines of the training program, institution and/or Red Cross and the achievement indicators listed.

Tools and Equipment:
Sterile gloves; sterile water; sterile gauze; tape; towel; screen.

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide resources and references related to this task.	1. Read assigned resources and references on treating a burn.
2. Review the anatomy and physiology of the integumentary system with the students.	2. Review the anatomy and physiology of the integumentary system.
3. Review aseptic technique and the sterile gloving procedure.	3. Review aseptic technique and sterile gloving procedure.
4. Have students label the layers of skin on a diagram.	4. Learn classification of burns.
5. Present a lecture/discussion on the classification of burn and how to distinguish between them.	5. Observe a demonstration of the task by instructor.
6. Demonstrate the task.	6. Do practice demonstration for instructor to critique.
7. Develop module if desired to accompnay task.	7. Demonstrate proficiency on a quiz related to this task.
8. Invite a staff person from a local burn unit to make a presentation on the classification and treatments of burns.	8. Demonstrate the task satisfactorily for an evaluator.
9. Give the students a quiz related to this task and evaluate the results.	
10. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	

Duty: Performing Clinical Tasks

Duty No. M

Task No. 19

Task: Perform cardiopulmonary resuscitation using available resources and models to practice reviving a client in respiratory and or cardiac arrest.

Achievement Indicators: The learner: Yes No

1. Tapped/touched victim and shouted to establish unresponsiveness - _____ _____
2. Established patient airway - _____ _____
3. Delivered respiratory resuscitation in prescribed manner- _____ _____
4. Delivered cardiac massage in prescribed manner - _____ _____
5. Maintained life support measures until:
    a. client was revived - _____ _____
    b. client was declared dead by a physician - _____ _____
    c. he/she was relieved by one who was equally competent- _____ _____
    d. he/she reached total exhaustion - _____ _____

Criteria: Competence in the task will be recognized when cardiopulmonary resuscitation is performed in a simulated situation according to the procedure of the American Heart Association and the achievement indicators listed.

Tools and Equipment:

Resusci Anne's; anatomic anne's; resusci babies; recording anne's; recording paper; disinfectant solution and container.

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Assemble materials needed to run audio-visual resources and to practice CPR.	1. Read the materials/modules provided on CPR.
2. Show audio-visual films/filmstrips on cardiopulmonary resuscitation.	2. View the audio-visual materials on CPR.
3. Demonstrate cardiopulmonary resuscitation to the class on Recording Anne if possible. Demonstrate both single rescuer, two person rescuer, and infant resuscitation.	3. Practice CPR on mannikins (both single rescuer, two person rescuer, and infant resuscitation)
4. Test students on manikins analyzing the tape from the recording Anne. (simualtion)	4. Receive certification from the teacher on manikin performance.
5. Critique each student and certify their manikin performance or arrange for a certified CPR instructor to demonstrate CPR and test students on CPR.	5. Demonstrate proficiency on a quiz related to this task.
6. Give the students a quiz related to this task and evaluate the results.	

Duty: Performing Clinical Tasks

Duty No. M

Task No. 20

Task: Apply direct pressure to a wound using appropriate resources to control blood flow from a wound.

Achievement Indicators: The learner: Yes NO

1. Located source of bleeding - ____ ____
2. Elevated bleeding part if possible - ____ ____
3. Assembled materials - ____ ____
4. Applied pressure directly to wound in prescribed manner - ____ ____
5. Maintained pressure until bleeding was controlled - ____ ____

Criteria: Competence in the task will be recognzied when direct pressure is applied to a bleeding wound according to the guidelines of the Red Cross and the achievement indicators listed.

Tools and Equipment:
Manikin; torso; anatomical wall chart; gauze

Resources:
See Bibliography.

Teacher Activities

1. Provide resources and references related to this task.
2. Review the anatomy of the circulatory system which may include the following:
    a. locating on self and torso major arteries and veins
    b. explaining what arteries supply blood to which areas of the body
    c. giving the approximate time blood should be controlled by compression of the artery to stop bleeding
3. Explain safety procedures related to this task.
4. Demonstrate compression methods for control of bleeding.
5. Give the students a quiz related to this task and evaluate the results.
6. Evaluate a student's demonstration of the task using the achievement indicators as a guide.

Student Learning Activities

1. Read assigned resources and references on bleeding.
2. Review the anatomy of the circulatory system.
3. Locate and name major arteries and veins on self and torso.
4. Observe a demonstration of compression of a wound for bleeding control by instructor.
5. Compress "wound" on self and peer to note amount of pressure to apply to control bleeding.
6. Reivew safety procedures for self and client related to this task.
7. Do demonstration of the task for instructor to critique.
8. Demonstrate proficiency on a quiz related to this task.
9. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 21

Task: Apply direct pressure to a pressure point using appropriate resources and a knowledge of the anatomical location of strategic arteries to control blood flow from a wound.

Achievement Indicators:

The learner:	Yes	No
1. Located source of bleeding -	____	____
2. Elevated bleeding part if possible -	____	____
3. Located artery which provides blood to the bleeding area -	____	____
4. Compressed artery until blood flow was controlled -	____	____

Criteria: Competence in the task will be recognized when direct pressure is applied to the appropriate artery according to the guidelines of the Red Cross and the achievement indicators listed.

Tools and Equipment:

Torso; anatomical wall chart; manikin

Resources:

See Bibliography.

Teacher Activities

1. Provide resources and references related to this task.
2. Review the anatomy of the circulatory system which may include the following:
   a. locating on self and torso, major arteries and veins
   b. explaining what arteries supply blood to which areas of the body
   c. giving the approximate time blood should be controlled by compression of the artery to stop bleeding
3. Explain safety procedures related to this task.
4. Demonstrate compression methods for control of bleeding.
5. Give the students a quiz related to this task and evaluate the results.
6. Evaluate a student's demonstration of the task using the achievement indicators as a guide.

Student Learning Activities

1. Read assigned unit on bleeding.
2. Review the circulatory system.
3. Locate and name major arteries and veins on self and torso.
4. Learn what artery supplies blood to the bleeding area.
5. Compress arteries on peer and self to note amount of pressure needed.
6. Review safety procedure for self and client.
7. Observe demonstration of compression of an artery for bleeding control by instructor.
8. Do practice demonstration for instructor.
9. Do demonstration for instructor to critique.
10. Demonstrate proficiency on a quiz related to this task.
11. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 22

Task: Apply bandages using appropraite materials to prevent further trauma to an injured area.

Achievement Indicators: The learner:

	Yes	No
1. Washed hands before and after procedure (if possible)-	____	____
2. Assessed client for location, type, and extent of injured area(s) -	____	____
3. Assembled supplies -	____	____
4. Secured bandage over injured area(s) in prescribed manner -	____	____
5. Inspected area surrounding bandage for circulation constriction -	____	____

Criteria: Competence in the task will be recognized when bandages are applied to injured area of the body according to the guidelines of the training program, Red Cross, and/or institution and the achievement indicators listed.

Tools and Equipment:

Bandages; tape; ties

Resources:

See Bibliography.

Teacher Activities

1. Provide resources and references related to this task.
2. Present a lecture/discussion which may include:
   a. types of bandages to be used for different injuries
   b. ways of securing bandages
   c. warning signs and symptoms of circulatory constriction
3. Demonstrate application of bandages on various locations of the body and on various types of injuries.
4. Demonstrate types of securing of bandage.
5. Give the students a quiz related to this task and evaluate the results.
6. Evaluate a student's demonstration of the task using the achievement indicators as a guide.

Student Learning Activities

1. Read assigned resources and references on application of bandages.
2. Learn the type of bandage to be used on a client depending on the location, type, and extent of injury.
3. Learn methods of securing bandages (pins, tapes, loops, ties).
4. Learn warning signs as to the possibilty of circulation constriction of bandage.
5. Do practice of different types of bandages using different securing methods.
6. Demonstrate proficiency on a quiz related to this task.
7. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 23

Task: Apply roller bandages- hand, whole leg (ankle, lower leg, knee, thigh), finger, head, eye.

Achievement Indicators: The learner:

		Yes	No
1.	Washed hands and explained procedure to the patient -		
2.	Chose the correct size of roller bandage -		
3.	Determined the type of application required :		
	a. circular -		
	b. spiral -		
	c. figure-eight -		
	d. monocular (eye) -		
	e. recurrent -		
4.	Placed gauze between skin surfaces that touch, such as two fingers or toes, before bandaging -		
5.	Applied the bandage by beginning at the distal point and wrapping toward the heart -		
6.	Elevated or kept the part being wrapped level with the heart -		
7.	Started with the inside of the bandage facing the assistant -		
8.	Placed a circular wrap around the starting point, made an anchor then another circular wrap -		
9.	Overlapped layers slightly and wrapped smoothly back and forth, distributing evenly, bandage was firm and supportive -		
10.	Fastened the end of the bandage with tape, safety pin, clamp, or split the end of the bandage and tied -		
11.	Inspected bandage for smoothness and support -		
12.	Checked for constricted blood flow:		
	a. felt for a difference in temperature -		
	b. checked the color for blanching, blush or mottled look -		

	Yes	No
c. asked patient about comfort -	____	____
13. Instructed patient to loosen bandage if any signs/ symptoms of constricted blood flow occurred -	____	____
14. Charted procedure -	____	____

Criteria: Competence will be recognized when the student is able to apply roller bandages by choosing the correct size and application according to the instructor's guidelines, assigned reading and achievement indicators.

Tools and Equipment:
Kline (elasticized gauze 2"); elasticized bandages (2", 3", 4"); roller gauze -½"; tape/ pin/clamp; scissors; eye pad

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post tests. 2. Prepare/present task list. 3. Assign reading. 4. Provide bandaging material set for every two students. 5. Demonstrate various wrappings: a. finger wrap b. hand/wrist wrap c. arm d. full leg wrap (foot, ankle to mid-thigh) e. head f. eye 6. Observe/assist in student practice. 7. Evaluate student demonstration.	1. Read assigned material. 2. Observe teacher demonstration. 3. Practice bandaging with another student: a. using a roller ½" gauze wrap a finger b. using a 2" elasticized bandage wrap hand- using circular and figure-eight, secure. c. using a 2" or 3" elasticized bandage (depending on size of arm) wrap an arm using circular with anchor/spiral wrap, secure. d. using 3" or 4" elasticized bandage wrap foot, ankle, leg, knee, to mid-thigh using circular with anchor figure eight, spiral-reverse and spiral, secure e. using 2" elasticized gauze wrap head using circular and recurrent, secure f. using 2" elastized bandage and eye pad wrap eye, secure. 4. Check circulation. 5. Roll play communicating procedure to patient. 6. Demonstrate bandaging to instructor for evaluation. 7. Extra-choose other areas of the body and wrap. Secure and check for circulation.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 24

Task: Apply tubular bandage.

Achievement Indicators: The learner:	Yes	No
1. Read manufacturer's instructions for using tubular gauze and applicator -	____	____
2. Washed hands and explained procedure -	____	____
3. Applied bandage as directed -	____	____
4. Inspected the bandage for proper:		
a. support without bulkiness -	____	____
b. mold to the exact shape of the finger -	____	____
5. Secured loose end with tape -	____	____
6. Explained to the patient how to:		
a. check for circulation -numbness, tingling, pain, color or temperature change -	____	____
b. loosen bandage if it is too tight -	____	____
7. Washed hands -	____	____
8. Assisted and dismissed patient -	____	____
9. Charted -	____	____

Criteria: Competence will be recognzied when the student is able to apply a tubular bandage according to the achievement indicators.

Tools and Equipment:

Handwashing supplies; tubular bandage; wire applicator; tape

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare tests/module/evaluation sheets.	1. Read assigned material.
2. Assign readings.	2. Observe demonstration.
3. Assemble equipment.	3. Practice with other students.
4. Demonstrate procedure.	4. Practice communication skills.
5. Assign student work groups.	5. Have teacher evaluate your performance.
6. Observe/assist student practice.	6. Return equipment.
7. Evaluate students.	7. Take a post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 25

Task: Assist a physician using appropriate equipment and a knowledge of different positions to perform routine physical examinations maintaining the comfort, privacy, and safety of the client.

Achievement Indicators:

The learner:	Yes	No
1. Checked doctor's order for type of examination -	____	____
2. Washed hands before and after procedure -	____	____
3. Assembled equipment and supplies -	____	____
4. Identified client -	____	____
5. Assisted client into exam apparel -	____	____
6. Assisted physician during exam in prescribed manner -	____	____
7. Assisted client during exam in prescribed manner -	____	____
8. Assisted client after exam as needed -	____	____
9. Cleaned and replaced equipment per institutional policy -	____	____

Criteria: Competence in the task will be recognized when the physician is assisted with a physical examination according to the institution's procedure and the achievement indicators listed.

Tools and Equipment:
Exam apparel; otoscope; ophthalmoscope; stethoscope; rubber gloves; vaginal speculum; reflex hammer; tuning fork; tongue blades; cotton-tipped applicators; flashlight; sphygmomanometer

Resources:
See Bibliography.

Teacher Activities

1. Present a lecture which may include:
    a. purpose of the physical exam
    b. types of exams
    c. care and use of equipment in a physical exam
    d. responsibilities to the client during a physical exam
2. Provide references and resources for this task.
3. Assemble supplies, equipment, exam apparel needed for each exam.
4. Demonstrate steps in each type of exam.
5. Evaluate a student's demonstration of the task using the achievement indicators as a guide.
6. Administer a quiz related to this task and evaluate the results.

Student Learning Activities

1. Read assigned reference and resources for this task.
2. Observed a demonstration of the task.
3. Attend a lecture/discussion related to this task.
4. Practice handling the equipment used in a physical exam.
5. Practice preparing a client for various types of physical exams.
6. Assist physician for each type of exam.
7. Clean and replace equipment after each type of exam.
8. Demonstrate the task satisfactorily for an evaluator.
9. Demonstrate proficiency on a quiz related to this task.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 26

Task: Perform routine biochemical tests under a supervisor's order using appropriate dipsticks, tapes, and/or tablets to test a urine specimen.

Achievement Indicators:

The learner:	Yes	No
1. Read doctor's order -	____	____
2. Washed hands before and after procedure -	____	____
3. Assembled urine specimen, equipment, and testing materials in designated area -	____	____
4. Tested urine specimen in prescribed manner -	____	____
5. Disposed of urine specimen and used supplies per institutional policy -	____	____
6. Cleaned and replaced equipment per institutional policy -	____	____
7. Recorded/reported results per institutional policy -	____	____

Criteria: Competence in the task will be recognzied when a urine specimen is tested according to a doctor's order, the directions of the testing materials manufacturer, and the achievement indicators listed.

Tools and Equipment:

Glucose; bio-acetone; hydrochloric acid (HCL) or vinegar; sodium hydroxide (NaOH) or baking soda; egg albumin crystals; distilled water; yellow coloring (vegetalbe dye); request slips; test tubes; specimen containers; beakers; analysis equipment

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide references and resources related to this task.	1. Read assigned resources and references for this task.
2. Present a lecture/discussion which may include: a. anatomy and physiology of the urinary system. b. normal constituents of urine. c. abnormal constituents of urine. d. factors affecting the accuracy of various biochemical tests on urine. e. method for recording results f. interpretation of results	2. Attend a lecture/discission on the subject.
3. Show 8 mm film "Testing for Sugar and Ketones".	3. View audio-visual materials related to the task.
4. Prepare solutions which simulate urine samples containing various amounts of urinary substances, i.e., sugar, acetone.	4. Observe a demonstration of the task.
5. Demonstrate different methods of analysis explaining the sources of error inherent in each: a. multitest sticks b. single or combination sticks c. chemstix d. clinitest tablets	5. Perform biochemical tests on simulated urine samples using: a. multitest sticks b. single or combination sticks c. chemstix d. clinitest tablets
6. Prepare a technique sheet listing method, sources of error and procedure for recording results.	6. Record results of each test and compare to answer key. Repeat test if results are incorrect.
7. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	7. Demonstrate the task satisfactorily for an evaluation.
8. Administer a quiz related to this task and evaluate the results.	8. Demonstrate proficiency on a quiz related to this task.

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 27

Task: Perform specific gravity.

Achievement Indicators: The learner:

The learner:	Yes	No
1. Washed hands -	____	____
2. Assembled equipment -	____	____
3. Filled the urinometer cylinder three-fourth full with urine (urine should be freshly voided) -	____	____
4. Inserted the urinometer in the urine with a slight spinning motion -	____	____
5. Obtained reading without the float touching the sides of the cylinder -	____	____
6. Correctly read the urinometer stem at eye level -	____	____
7. Recorded results correctly -	____	____
8. Rinsed and dried the urinometer, washed hands -	____	____
9. Replaced equipment -	____	____

Criteria: Competence will be recognized when the student obtains a specific gravity reading and records it according to the achievement indicators as determined by the instructor.

Tools and Equipment:	**Resources:**
urine specimen; urinometer; paper towels; patient's chart; pen	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post tests.	1. Read and complete pre/post tests.
2. Prepare modules.	2. Read modules.
3. Give demonstration.	3. Attend demonstration.
4. Lecture and discussion.	4. Attend lecture discussion.
5. Filmstrips on urinalysis.	5. Attend showing of filmstrips on urine.
6. Form groups for testing each ones urine.	6. Practice in groups testing each others urine.
7. Watch student demonstration for evaluation.	7. Demonstrate skill for instructor for evaluation.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 28

Task: Collect a specimen of body discharge using a knowledge of asepsis and the digestive, urinary and respiratory systems and appropriate equipment to obtain an ordered specimen for diagnostic testing.

Achievement Indicators: The learner:

	Yes	No
1. Read physician's order -	____	____
2. Washed hands before and after procedure -	____	____
3. Assembled equipment -	____	____
4. Identified client -	____	____
5. Screened client from the view of others if appropriate -	____	____
6. Explained procedure for specimen collection to assure cooperation of the client -	____	____
7. Assisted client to obtain specimen in prescribed manner -	____	____
8. Recorded/reported specimen collection per institutional policy -	____	____

Criteria: Competence in the task will be recognzied when a specimen of a body discharge is collected according to institutional policy and the achievement indicators listed.

Tools and Equipment:

Chemically clean or sterile urine containers*; gauze; containers for stool collection; nutrient broth; sterile applicator sticks; plastic tray; UV chalk; UV light; (NaOH) sodium hydroxide; phenothalein

*These containers may be used for sputum and/or stool collection if stool specimen container is not available.

Resources:

Teacher Activities

1. Present a lecture/discussion on the topics of asepsis; anatomy of the digestive, urinary, and respiratory systems and principles involved in specimen collection.
2. Lecture/discuss these topics;
   a. types of specimens used in diagnosis
   b. methods of collecting
   c. errors that interfere with proper diagnosis
   d. recording the collection
3. Provide references and resources related to this task.
4. Demonstrate the steps for collecting:
   a. urine specimen
   b. routine
   c. CCMS
5. Demonstrate steps for sputum collection.
6. Demonstrate communications needed to obtain stool specimen from client.
7. Demonstrate technique for collecting a specimen of nasal discharge.
8. Prepare slides from a CCMS and routine urine specimen and set up microscopes for students to view differences.
9. Demonstrate casual contamination using a box covered with chalk dust that glows in UV light.
10. Evaluate a student's demonstration of collection of one or more types of specimens using the achievement indicators as a guide.
11. Administer a quiz related to this task and evaluate the results.

Student Learning Activities

1. Read assigned resources and references for this task.
2. Attend a lecture/discussion on the topics of asepsis; anatomy of the digestive, urinary, and respiratory systems and pertinent principles involved in specimen collection.
3. Observe a demonstration of the task.
4. Collect urine specimen:
   a. routine
   b. CCMS (Clean-catch midstream)
5. Collect sputum specimen and a specimen of saliva, Make slides of both and compare results.
6. Collect stool specimen (this can be simulated using either dampened ginger snaps or crunchy or smooth peanut butter).
7. Collect nasal discharge.
8. Instruct another in collecting various types of specimens (sputum, urine, feces, etc.).
9. Complete an exercise on how a specimen may be contaminated using concentrated sodium hydroxide and phenothalein.
10. Demonstrate the collection of one or more types of specimens satisfactorily for an evaluation.
11. Demonstrate proficiency on a quiz related to this task.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 29

Task: Label a specimen from a client using appropriate materials to identify the specimen.

Achievement Indicators: The learner:	Yes	No
1. Obtained specimen to be labeled -		
2. Properly sealed specimen to avoid contamination -		
3. Assembled label(s) and/or laboratory slip appropriate for specimen and tests -		
4. Filled in the label(s) and/or laboratory slips with all information pertinent to tests requested (pt's name, Id number, physician's name etc.) -		
5. Maintained all sanitary conditions -		
6. Stored in appropriate manner -		
7. Washed hands -		
8. Charted all information -		

Criteria: Competence will be recognized when the student demonstrates labeling and packageing a specimen for testing. All lab slips/and or labels must contain all information pertinent to the laboratory and physician's orders as presented by the instructor and the textbooks.

Tools and Equipment:

lab slips; labels; container for shipping; tops for the containers; plastic bags; equipment for storage

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post tests.	1. Read and complete pre/post tests.
2. Prepare and present modules and hand-outs.	2. Read modules.
3. Use over-view to demonstrate filling out a variety of lab slips.	3. Read and save for references all hand-outs.
4. Provide different types of containers for shipping purposes.	4. Attend demonstrations.
5. Provide physician's orders for various lab tests.	5. Practice filling out a variety of lab. slips/labels.
6. Present a lecture/discussion on different lab tests and their purpose.	6. Attend lectures.
7. Observe students demonstrations.	7. Demonstrate skills for the instructor's evaluation.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 30

Task: Measure body weight using a scale to obtain data.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands before and after procedure -	____	____
2. Obtained a scale -	____	____
3. Identified client -	____	____
4. Explained procedure of obtaining weight to assure cooperation of the client -	____	____
5. Assisted client onto scale as needed -	____	____
6. Manipulated scales in prescribed manner -	____	____
7. Assisted client off scale as needed -	____	____
8. Recorded/reported the weight per institutional policy -	____	____

Criteria: Competence in the task will be recognized when the weight of a client is obtained within the range of accuracy acceptable to the training program or institution and according to the achievement indicators listed.

Tools and Equipment:

Table scale; balance scale; floor scale

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide references and resources related to this skill.	1. Read assigned resources and references related to obtaining weight.
2. Demonstrate task on different types of scales.	2. Observe demonstration of task.
3. Check weight readings obtained by the students during practice.	3. Weigh self on different types of scales and record results.
4. Review conversion of pounds to kilograms. Provide students with worksheets to practice conversions.	4. Weigh three different students on different types of scales and record. Have another verify readings.
5. Administer a quiz related to this task and evaluate the results.	5. Review metric/English weight worksheets.
6. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	6. Practice mathematical conversions of pounds to kilograms.
	7. Demonstrate proficiency on a quiz related to this task.
	8. Demonstrate the task satisfactorily for an evaluator.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 31

Task: Measure body height using an appropriate measuring device to obtain data.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands before and after procedure -	____	____
2. Obtained measuring device -	____	____
3. Identified client -	____	____
4. Explained procedure for obtaining height to assure cooperation of the client -	____	____
5. Assured client is barefoot and standing erect -	____	____
6. Manipulated measuring device in prescribed manner -	____	____
7. Recorded/reported the height per institutional policy -	____	____

Criteria: Competence in the task will be recognized when the height of a client is determined within the acceptable range of accuracy or the training program or institution and according to the achievement indicators listed.

Tools and Equipment:

Yardsticks; tape measure; height measurement apparatus on a scale

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide resources and references.	1. Read assigned resources and references for this task.
2. Demonstrate measurement of height in both English and metric systems.	2. Observe a demonstration of the task.
3. Recheck and verify heights obtained by students in practice.	3. Measure own height and record.
4. Conduct individual and group discussion regarding recorded heights.	4. Measure height of three different students and record.
5. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	5. Demonstrate the task satisfactorily for an evaluation.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 32

Task: Assess a radial, brachial, carotid, femoral and/or pedal artery pulse using appropriate timing device and knowledge of the cardiovascular system to determine the rate, rhythm and force of client's pulse.

Achievement Indicators: The learner:	Yes	No
1. Washed hands before and after procedure -	____	____
2. Assembled equipment -	____	____
3. Identified client -	____	____
4. Explained procedure for taking pulse to assure the cooperation of the client -	____	____
5. Took pulse in prescribed manner -	____	____
6. Recorded/reported pulse per institutional policy -	____	____

Criteria: Competence in the task will be recognized when the pulse rate of a client is obtained according to the guidelines of the training program or institution and the achievement indicators listed.

Tools and Equipment:	**Resources:**
Filmstrip on taking pulse and filmstrip equipment; clock with second hand	See Bibliography.

Teacher Activities

1. Have filmstrip on task set-up.
2. Discuss the anatomy and physiology of the cardiovascular system that relates to pulse.
3. Demonstrate pulse sites on self and have students palpate the same pulse on themselves simultaneously.
4. Assign students to practice taking pulse on family members and to bring recorded pulses to class.
5. Check and verify at least one pulse for each student.
6. Administer a quiz related to this task and evaluate the results.
7. Evaluate a student's demonstration of the task using the achievement indicators as a guide.

Student Learning Activities

1. Read assigned reference materials and attend a lecture/discussion related to the task.
2. View filmstrip on taking pulses.
3. Observe demonstration by teacher on taking pulses.
4. Locate each pulse on self.
5. Locate each pulse on another student.
6. Count and record radial pulses on five different students. Have another count two of the pulses simultaneously to verify the accuracy of the reading.
7. Count and record pulses on same student:
    a. lying down
    b. sitting in chair
    c. after walking for two minutes
    d. after running in place for two minutes
8. Discuss with teacher rhythm and force of recorded pulses.
9. Practice taking pulses at each site on family member and record pulses.
10. Demonstrate proficiency on a quiz related to this task.
11. Demonstrate the task satisfactorily to an evaluator.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 33

Task: Measure a temperature using an appropriate measuring device to determine a client's body heat.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands before and after procedure -		
2. Assembled equipment -		
3. Identified client -		
4. Explained procedure for taking temperature to assure cooperation of client -		
5. Took temperature in prescribed manner -		
6. Cleaned and replaced equipment per institutional policy -		
7. Recorded temperature reading per institutional policy -		

Criteria: Competence in the task will be recognized when the temperature of a client is taken according to the guidelines of the institution and/or training program and the achievement indicators listed.

Tools and Equipment:

Glass oral thermometer; glass rectal thermometer; electronic thermometer and covers; heat sensitive tape; disinfectant solution and container; plastic sheath for glass thermometer; gauze or kleenex; plastic tray

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture on the importance and meaning of normal and abnormal body temperature.	1. Read assigned resources and references for this task and attend a lecture/discussion about normal and abnormal body temperature.
2. Set up and present audio-visual material on how to take a temperature.	2. View the audio-visual materials on how to measure a client's temperature.
3. Demonstrate taking an oral and/or auxillary temperature of another.	3. Observe a demonstration of the task.
4. Demonstrate taking a rectal temperature on a "dummy".	4. Read five thermometers with different temperature readings accurately.
5. Assemble different heat sensing devices as glass thermometers, electronic thermometers, heat sensitive tape. Have the students take temperature readings on one another using these materials and then discuss the results.	5. Take temperature of another. Have him/her drink ice water and take his/her temperature again. Have him/her drink something hot and take his/her temperature again. Compare the readings.
6. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	6. Take the temperature of another student using a glass thermometer, an electronic thermometer, and heat sensitive tape and compare the readings.
7. Administer a quiz related to this task and evaluate the results.	7. Take the temperature of each member in your family.
	8. Identify deviations from the normal temperature pattern.
	9. Demonstrate the task satisfactorily to an evaluator.
	10. Demonstrate proficiency on a quiz related to this task.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 34

Task: Assess respirations using an appropriate timing device to determine the rate, rhythm and depth.

Achievement Indicators: The learner:

	Yes	No
1. Assembled equipment -	____	____
2. Identified client -	____	____
3. Counted respirations in prescribed manner -	____	____
4. Recorded/reported respirations per institutional policy -	____	____

Criteria: Competence in the task will be recognized when the respirations of a client are assessed according to the guidelines of the institution or training program and the achievement indicators listed.

Tools and Equipment:

Clock or watch with second hand

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss the anatomy and physiology of the respiratory system and normal and abnormal conditions which can affect respiration.	1. Read assigned reference materials and attend a lecture/discussion related to this task.
2. Show audio-visual materials on this task.	2. View the audio-visual materials on respiration.
3. Demonstrate the task.	3. Observe a demonstration of the task.
4. Review process for recording respriations.	4. Count own respirations.
5. Assign students to take respirations on five different students.	5. Count and record respirations on five different students. Ask for verification.
6. Assign students to practice taking respirations on family members and bring recorded respirations to class.	6. Count and record respirations on same student: a. lying down b. sitting in chair c. after walking for 2 minutes d. after running in place for 2 minutes
7. Evaluate a student's demonstration of the task using the achievement indicators as a guide.	7. Discuss with teacher recorded respirations.
8. Administer a quiz related to this task and evaluate the results.	8. Practice taking respirations on family members and bring record to class.
	9. Demonstrate the task satisfactorily to an evaluator.
	10. Demonstrate proficiency on a quiz related to this task.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 35

Task: Measure blood pressure using appropriate equipment to determine systolic and diastolic readings.

Achievement Indicators: The learner:	Yes	No
1. Washed hands before and after procedure -	____	____
2. Assembled equipment -	____	____
3. Identified client -	____	____
4. Explained procedure for measureing blood pressure to assure cooperation of the client -	____	____
5. Took blood pressure in prescribed manner -	____	____
6. Obtained an accurate reading -	____	____
7. Cleaned and replaced equipment per institutional policy -	____	____
8. Recorded/reported blood pressure readings per institutional policy -	____	____

Criteria: Competence in the task will be recognized when the blood pressure of a client is measured according to the procedure of the institution or training program and the achievement indicators listed.

Tools and Equipment:

Filmstrip on BP procedure and A-V equipment to show it; alcohol swabs; sphygmomanometers, a. mercury b. aneroid; stethoscopes, a. single b. dual; tape on korotkoff sounds

Resources:

See Bibliography.

Teacher Activities

1. Present a lecture/discussion on this task which may include:
    a. anatomy of the cardiovascular system
    b. definition and significance of blood pressure in health and disease
    c. definition, signs and symptoms, and significance of hypertension
2. Provide references and resources.
3. Set-up and present audio-visual materials related to this task.
4. Demonstrate procedure for taking BPs to students and recording the readings.
5. Arrange for practice sessions using students and other teachers as "patients".
6. Take a BP using a dual stethoscope with a student to verify the accuracy of the reading.
7. Administer a quiz related to this task and evaluate the results.
8. Evaluate a student's demonstration of the task using the achievement indicators as a guide.

Student Learning Activities

1. Read assigned resources and references for this task.
2. View audio-visual materials on BP procedure.
3. Listen to tape on the Sounds of Korotkoff.
4. Attend a lecture discussion on the subject of blood pressure.
5. Observe demonstration of BP.
6. Practice handling diffenent types of cuffs and stethoscopes.
7. Practice taking BPs on five students.
8. Take BPs on four different students using the dual stethoscope for verification. Record/report BPs on simulated client record.
9. Take BP on same student:
    a. lying down
    b. sitting in chair
    c. after walking for 2 minutes
    d. after running in place for 2 minutes
10. Take BP on at least one of the following:
    a. a child
    b. an adult over 65
11. Demonstrate proficiency on a quiz related to this task.
12. Demonstrate the task satisfactorily for evaluator.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 36

Task: Perform E.K.G./E.C.G. test.

Achievement Indicators: The learner: Yes No

1. Washed hands before and after procedure - ____ ____
2. Assisted patient to disrobe - ____ ____
3. Draped patient - ____ ____
4. Explained procedure to the patient - ____ ____
5. Checked machine (patient cable should be properly connected, machine should be plugged into electrical outlet, machine should be properly grounded) - ____ ____
6. Turned power switch on and allowed recommended time for machine to warm up - ____ ____
7. Standardized the machine - ____ ____
8. Applied contact jelly and limb leads (leads must be placed on fleshy part of limbs) - ____ ____
9. Adjusted the stylus position - ____ ____
10. Obtained limb leads in proper order (each lead must be marked for easy identification) - ____ ____
11. Ran chest leads in sequence V1-V6 marking each for identification - ____ ____
12. Shut off machine and removed tracing - ____ ____
13. Removed all jelly from patient's body - ____ ____
14. Marked tracing with patients identification - ____ ____

Continued...

Criteria: Competence in the task will be recognized when the student has obtained a readable tracing. All leads must be marked for identification as presented in modules, textbooks and according to office standards.

Tools and Equipment: An electrocardiograph; electrode paste/gel; gauge squares; tongue blades	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post tests.	1. Take pre/post test.
2. Prepare and present hand-out sheets.	2. Read modules/textbooks.
3. Set-up and present filmstrip on procedure for obtaining an EKG.	3. Review handouts.
4. Discuss diagnostic importance of an EKG to the physician and patient.	4. Observe teacher demonstration.
5. Prepare and present varieties in EKG tracings.	5. Practice operating an EKG machine.
6. Demonstrate obtaining an EKG.	6. Role play placing leg and chest leads on peers.
7. Observe student performance using task sheets.	7. Obtain EKG tracings on peers.
8. Evaluate student's demonstration of the task using the achievement indicators as guides.	8. Check tracings for artifacts.
	9. Check all lead tracings for incorrect markings.
	10. View filmstrips.
	11. Mount tracings.
	12. Demonstrate skill for evaluation.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 37

Task: Mount E.K.G./E.C.G. graphs.

Achievement Indicators: The learner:

	Yes	No
1. Obtained properly identified tracings -	____	____
2. Obtained EKG mounts -	____	____
3. Cut tracing to fit space provided for lead -	____	____
4. Marked leads for easy identification (if necessary) -	____	____
5. Completed patient information in space provided -	____	____
6. Filed mount in specified area -	____	____

Criteria: Competence in the task will be recognized when the learner has mounted readible tracings of an EKG according to modules, textboods and instructors guidelines.

Tools and Equipment:

EKG tracings; scissors/tongue blades; EKG mounts

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide pre/post test.	1. Take pre test
2. Provide EKG tracings.	2. Obtain materials for mounting tracings.
3. Give demonstration.	3. Practice cutting and mounting tracings.
4. Prepare modules/textbooks.	4. Read modules/textbooks.
5. Check mountings for all necessary patient information.	5. Attend instructor's demonstration.
6. Evaluate student's demonstration.	6. Demonstrate skill for instructor's evaluation.

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 38

Task: Clean E.K.G. equipment after use.

Achievement Indicators: The learner:

		Yes	No
1.	Turned the machine off -	____	____
2.	Removed the electrodes and jelly from the patient -	____	____
3.	Disconnected the cable from the electrodes -	____	____
4.	Disconnected the power cord from the wall outlet -	____	____
5.	Clean the electrodes (with warm running water and dry with soft cloth or gauze squares) -	____	____
6.	Wiped the limb straps with a damp cloth -	____	____
7.	Cleaned screw grooves -	____	____
8.	Dusted machine stand and control panel -	____	____
9.	Checked paper roll, replace if necessary -	____	____
10.	Inspected lead wires for damage -	____	____
11.	Stored all lead wires in proper place -	____	____
12.	Replaced cover over machine -	____	____

Continued...

Criteria: Competence in this task will be recognzied when the student has demonstrated disconnecting and cleaning an E.K.G. machine and lead wires and storing machine as presented in modules, textbooks and demonstrated by instructor.

Tools and Equipment:	**Resources:**
An E.K.G. machine; gauze squares/soft towel; warm water; storage cabinet or compartment; cover for machine	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post test. 2. Present filmstrip on the care of an E.K.G. machine. 3. Prepare and distribute hand-out/ modules. 4. Present demonstration. 5. Review manufacturer's instruction booklet with students. 6. Evaluate student's performance.	1. Take pre/post test. 2. Observe filmstrips. 3. Practice setting up and disconnecting an E.K.G. machine. 4. Role play removing gel from peers. 5. Practice folding and connecting the power cord and lead wires. 6. Attend instructor demonstration. 7. Study hand-out and modules and textbook. 8. Read manufacturer's instructions on E.K.G. 9. Demonstrate procedure for instructor's evaluation.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 39

Task: Assist with a papaniculous smear.

Achievement Indicators: The learner:

The learner:	Yes	No
1. Instructed the patient to empty the bladder -		
2. Washed hands -		
3. Assembled equipment -		
4. Explained procedure -		
5. Instructed patient to disrobe and put on gown -		
6. Placed towel on end of table or used examination paper to protect table -		
7. Assisted patient into lithotomy position -		
8. Draped patient -		
9. Directed the light source -		
10. Warmed the speculum -		
11. Assisted patient to relax -		
12. Assisted patient out of stirrups and to get up -		
13. Applied fixative to slides, checked the label and filled out lab slips -		
14. Removed and cleaned equipment -		
15. Placed specimens in lab pick-up -		
16. Washed hands -		

Continued...

Criteria: Competency will be recognized when the student is able to prepare the equipment and the patient, and to assist the client and doctor with the procedure.

Tools and Equipment:

Vaginal speculum (3 sizes); uterine dressing forceps; lubricant; screens; light; stool; exam table with stirrups; 2 slides; fixative; lables; lab lips; cleansing tissue; rubber gloves; clean cotton applicator sticks; receiving basin for cleaning; normal saline slide; cover slid

Resources:

See Bibliography.

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 40

Task: Prepare slide for differential count.

Achievement Indicators: The learner:	Yes	No
1. Assembled equipment -	____	____
2. Explained procedure to patient (purpose and finger puncture) -	____	____
3. Labeled 2 slides -	____	____
4. Washed hands -	____	____
5. Performed finger puncture -	____	____
6. Placed drop of blood on each of the slides, not letting patient's finger touch slides -	____	____
7. Held a second slide at a 45^{0} angle to the first slide and spread the blood thinly and evenly across the blood slide -	____	____
8. Inspected slides for quality -	____	____
9. Dried the blood smears -	____	____
10. Stained according to office procedure -	____	____
11. Placed slide in a drying rack in a vertical position with the thickest end of the smear downward -	____	____
12. Washed hands -	____	____
13. Returned equipment -	____	____

Criteria: Competency will be recognized when the student is able to prepare a blood slide for a differential count focus microscope using oil immersion and recognize white blood cells according to the achievement indicators.

Tools and Equipment:	**Resources:**
lancet-antiseptic; cotton balls; sterile dry cotton ball or gauze; 4 slides, 2 labels; microscope, oil; Wrights; stain; drying rack; colored pencils; 2 slide holders	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare test and module.	1. Read module and assigned reading.
2. Assemble equipment.	2. View filmstrip.
3. Prepare filmstrip.	3. Draw and label each major type of white blood cell.
4. Review finger puncture.	4. Write a description under each of the W.B.C.'s drawn.
5. Review oil immersion.	5. Observe teacher demonstration.
6. Demonstrate procedure.	6. Choose a partner and practice procedure.
7. Assist students with identification.	7. Ask for assistance when needed.
8. Evaluate performance.	8. Have teacher evaluate performance.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 41

Task: Perform white blood count.

Achievement Indicators: The learner:

	Yes	No
1. Assembled equipment -		
2. Washed hands and performed a skin puncture (if required) -		
METHOD I		
3. Drew the blood up to the 0.5 mark on the pipette -		
4. Wiped the blood off the outside of the tip of the pipette -		
5. Kept the tip immersed in the diluting fluid and drew the diluting fluid up to the 11 mark on the pipette -		
6. Rotated the pipette as it was filled and tapped the bulb of the pipette as the solution entered it -		
7. Removed the tubing and held the pipette in a horizontal position with a finger placed over the end (see below) -		
METHOD II		
3. Drew the blood into pre-measured solution container with attached pipette -		
4. Wiped the blood off the outside of the tip of the pipette -		
5. Punctured the solution container -		
6. Drew the blood into the diluting fluid by squeezing sides of the solution container -		
7. Followed the manufacturer's instructions -		
8. Mixed the blood and diluting fluid for 3 to 5 minutes -		
9. Controlled the flow of the solution in the pipette by placing a finger over the end -		

	Yes	No
10. Expelled 3 drops from the pipette -		
11. Placed a clean coverglass on the counting chamber -		
12. Charged hemacytometer chamber -		
13. Waited for the cells to settle for 2 to 3 minutes -		
14. Placed the counting chamber on the microscope and focused it using the low power objective -		
15. Scanned the ruled counting area and made sure the cells were evenly distributed -		
16. Counted the number of white blood cells in each of the four corner squares of the ruled counting area -		
17. Calculated the number of white blood cells -		
18. Recorded results -		
19. Properly cleaned the equipment -		

Criteria: Competency will be recognized when the student is able to prepare a white blood cell count according to the achievement indicators as determined by the instructor.

Tools and Equipment:
White pipette tubing; mouth piece; diluting solution; premeasured solution with attached pipette; antiseptic swab; lancet; sterile dry cotton balls; hemacytometer; microscope; counters; WBC; pipette

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Read assignment.
3. Secure filmstrip.	3. View filmstrip.
4. Have lab tech come in and demonstrate procedure and assist students.	4. Observe demonstration.
5. Set up a demonstration microscope for students to view counting area.	5. Practice.
6. Supervise practice.	6. Have instructor evaluate.
7. Evaluate students.	7. Take post test.
Note: Have students try counting their own blood specimens. They are more interested and accurate.	

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 42

Task: Perform red blood count.

Achievement Indicators: The learner: Yes No

1. Assembled equipment - ____ ____
2. Washed hands - ____ ____
3. Obtained a capillary blood specimen - ____ ____
4. METHOD I
   - a. Drew blood up to 0.5 mark on a red pipette - ____ ____
   - b. Wiped the blood off the tip quickly - ____ ____
   - c. Held tongue over mouth piece opening to maintain level of solution - ____ ____
   - d. Removed tubing and held pipette in horizontal position - ____ ____

   METHOD II
   - a. Drew blood into premeasured solution/pipette container - ____ ____
   - b. Punctured container - ____ ____
   - c. Drew blood into container - ____ ____
   - d. Mixed gently for 2 minutes - ____ ____
5. Expelled 3-5 drops even to 1/3 the bulb's contents - ____ ____
6. Charged hemcytometer chamber and waited 2 minutes for cells to settle - ____ ____
7. Placed hemcytometer on microscope and focused it on low power - ____ ____
8. Located red counting area - ____ ____
9. Moved top left handed corner square - ____ ____
10. Switched to high power - ____ ____
11. Counted the 5 areas - ____ ____
12. Calculated the results - ____ ____

	Yes	No
13. Recorded results -	____	____
14. Cleaned and returned equipment -	____	____

Criteria: Competency will be determined when the student is able to prepare a red cell count and practice counting as determined by the achievement indicators and the instructor.

Tools and Equipment:	**Resources:**
Red pipette; tubing mouth piece; diluting solution; prepared units; antiseptic swabs; sterile cotton balls; lancets; hemcytameter; microscope; counters	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Read assignment.
3. Secure filmstrip.	3. View filmstrip.
4. Have lab tech come in and demonstrate procedure and assist students.	4. Observe demonstration.
5. Set up a demonstration microscope for students to view counting area.	5. Practice.
6. Supervise practice.	6. Have instructor evaluate.
7. Evaluate students.	7. Take post test.
Note: Have students try dounting their own blood specimens. They are more interested and accurate.	

Duty: Performing Clinical Tasks

Duty No. M

Task No. 43

Task: Use the microscope.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands -		
2. Obtained equipment -		
3. Moved microscope correctly -		
4. Handled slide by edges -		
5. Placed microscope on table safely -		
6. Placed objectives in correct beginning position -		
7. Placed slide on stage correctly -		
8. Turned on light source -		
9. Focused on low power using the coarse adjustment then fine adjustment -		
10. Changed objective to high and dry, focused -		
11. Applied oil to slide -		
12. Focused oil emersion objective -		
13. Demonstrated procedure when focal point is passed -		
14. Cleaned and stored scope properly -		
15. Returned slides or disposed of them appropriately -		

Continued...

Criteria: Competency will be recognized when the student handles and operates the microscope according to the guidelines presented in the achievement indicators and established by the instructor.

Tools and Equipment:	**Resources:**
Microscope with oil emersion lens; lens papers; oil emersion; prepared bacterial slides	See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Prepare module- use a picture of microscope to assist student- in learning parts. 2. Assemble prepared bacterial slides (can buy from companies). 3. Focus 2 microscopes to show students what bacteria looks like. 4. Have students draw what they see- assign 3 slides and they are to draw each on low power 10x or high/dry 40x then oil emersion. 5. Evaluate student. 6. Give post test.	1. Secure module. 2. Read assignment. 3. View bacteria in instructor microscope. 4. Obtain equipment. 5. Draw assigned slides. 6. Have instructor evaluate performance. 7. Take post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 44

Task: Prepare urine for microscopic examination.

Achievement Indicators: The learner:	Yes	No
1. Explained procedure to the patient -	____	____
2. Handled specimen aseptically -	____	____
3. Filled tube 3/4" from top -	____	____
4. Loaded a balanced centrifuge -	____	____
5. Noted number of centrifuge slot and recorded patient's name -	____	____
6. Timed centrifuge -	____	____
7. Discarded supernatant -	____	____
8. Mixed remaining sediment (optional: added sedi-stain)-	____	____
9. Placed drop on slide (using pipette or manually using second drop) -	____	____
10. Lowered cover slip from a 45^{0} angle -	____	____
11. Placed slide on microscope stage -	____	____
12. Focused microscope on low power -	____	____
13. Called for lab tech or physician -	____	____
14. Cleaned equipment -	____	____
15. Washed hands -	____	____

Criteria: Competency will be recognized when the student prepares urine for a microscope examination according to the instructor and achievement indicators.

Tools and Equipment: Centrifuge with clean tubes; clean catch urine specimen; slide; cover slip; microscope; sedi-stain (optional); label paper; pasteur pipette (optional).	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Read assignment.
3. Secure filmstrip.	3. Collect clean catch urine specimen.
4. Demonstrate procedure.	4. Assembled equipment.
5. Supervise student practice - suggest they use their own clean catch specimen.	5. View filmstrip.
6. Evaluate student.	6. Observed and participated in demonstration and class discussion.
7. Give post test.	7. Practice.
	8. Have instructor evaluate performance.
	9. Take post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 45

Task: Obtain a capillary blood specimen.

Achievement Indicators: The learner: Yes No

1. Washed hands - ____ ____
2. Assembled equipment - ____ ____
3. Identified patient and explained procedure - ____ ____
4. Inspected fingers for scars, infection, and chose middle finger, if possible - ____ ____
5. Cleansed puncture site vigorously and allowed it to dry - ____ ____
6. Opened the sterile lancet without contaminating it - ____ ____
7. Grasped the middle finger firmly and made puncture with sterile lancet - ____ ____
8. Wiped away first drop of blood with a sterile gauze or cotton ball - ____ ____
9. Collected specimen on clean labeled slide - ____ ____
10. Did not allow patient's finger to touch slide - ____ ____
11. Did not squeeze fingers to obtain blood - ____ ____
12. Milked hand to the base of the finger if more blood was needed - ____ ____
13. Provided patient with gauze or cotton ball for pressure over puncture - ____ ____
14. Cleaned up area - ____ ____
15. Washed hands - ____ ____

Criteria: Competence will be recognized when the student is able to collect a capillary blood specimen according to the achievement indicators.

Tools and Equipment: Lancet; antiseptic; sterile cotton balls or gauze; slide; tape for label	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare modules and tests.	1. Secure module.
2. Assemble equipment.	2. Read assigned material.
3. Demonstrate procedure.	3. Observe demonstration.
4. Demonstrate the 3 major sites (finger-heel-ear lobe).	4. Practice.
5. Observe finger puncture practice.	5. Have instructor evaluate performance.
6. Evaluate student.	

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 46

Task: Perform hematocrit test (microhematocrit method).

Achievement Indicators: The learner:

		Yes	No
1.	Assembled equipment -	____	____
2.	Washed hands -	____	____
3.	Identified patient and explained procedure -	____	____
4.	Performed a finger puncture -	____	____
5.	Wiped first drop away -	____	____
6.	Held capillary tube at a horizontal level -	____	____
7.	Filled capillary tube approximately 3/4 full, without air bubbles -	____	____
8.	Sealed end of the capillary tube -	____	____
9.	Placed capillary tube in the microhematocrit centrifuge with the sealed end towards the outside -	____	____
10.	Balanced the centrifuge -	____	____
11.	Centrifuged specimen -	____	____
12.	Read the results accurately -	____	____
13.	Recorded results, returned equipment and washed hands -	____	____

Criteria:

Tools and Equipment: Lancet; antiseptic swabs; sterile sponge or cotton ball; heparinized capillary tube; sealing clay; microhematocrit centrifuge	**Resources:** See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Prepare modules and tests.	1. Secure module.
2. Assemble equipment.	2. Read assigned materials.
3. Secure filmstrip.	3. Watch filmstrip.
4. Discuss purpose and principals.	4. Observe demonstration.
5. Prepare a work sheet that has the student determining if the hematocrits are normal.	5. Practice procedure.
6. Demonstration.	6. Have instructor evaluate your performance.
7. Observe/assist student practice.	
8. Evaluate students.	

Duty: Performing Clinical Tasks

Duty No. M

Task No. 47

Task: Perform venipuncture (syringe method).

Achievement Indicators:

The learner:	Yes	No
1. Washed hands -	____	____
2. Assembled equipment -	____	____
3. Identified patient and explained procedure -	____	____
4. Selected appropriate site -	____	____
5. Applied tourniquet -	____	____
6. Cleansed skin and allowed it to dry -	____	____
7. Injected needle with bevel up at the proper angle -	____	____
8. Withdrew adequate specimen -	____	____
9. Applied pressure with a dry sterile cotton ball -	____	____
10. Released tourniquet and withdrew needle -	____	____
11. Instructed client to elevate arm and continue pressure -	____	____
12. Removed needle from syringe and stopper from the containers -	____	____
13. Injected the blood slowly into the containers -	____	____
14. Replaced stoppers -	____	____
15. Inverted anticoagulant tubes 2-3 times -	____	____
16. Inspected the site for bleeding -	____	____
17. Applied bandage after bleeding stopped or a sterile dry cotton ball with tape -	____	____
18. Checked labels and lab slips for completeness -	____	____
19. Placed specimen in appropriate place for pick-up -	____	____
20. Destroyed needle and disposed of equipment -	____	____
21. Washed hands -	____	____

Criteria: Competence will be recognized when the student can collect a blood specimen using the syringe method venipuncture, according to the achievement indicators as determined by the instructor.

Tools and Equipment:	**Resources:**
Sterile/dry syringe 10cc-20cc; needles, 19-20 gauge, 1-1½"; selection of vacutainers; labels; lab slips; tourniquet; antiseptic swabs; sterile cotton balls; bandages; injectable arm	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module. 2. Prepare a variety of patient orders for blood work. 3. Assemble equipment. 4. For mass practice obtain amber rubber tubing and have students place it under paper toweling or small chux squares. Have them practice with you after first demonstration. 5. Assign work groups for student practice over several days. 6. Evaluate students. 7. Prepare and give post test. OPTIONAL: 8. Prepare parent permission slips for students under 18 to have their blood drawn.	1. Obtain module. 2. Read assignments. 3. Observe demonstration. 4. Obtain equipment. 5. Practice with instructor using amber tubing covered by paper/plastic chux or toweling. 6. Work with assigned group on injectable arm (simulator). 7. Practice selecting the correct vacutainers for the orders given. 8. Have instructor evaluate you on simulator. OPTIONAL: 9. Secure a permission slip for parents to sign if under 18. 10. Draw specimen on classmate and then have one drawn.

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 48

Task: Perform venipuncture (vacuum method).

Achievement Indicators: The learner:	Yes	No
1. Washed hands -	____	____
2. Identified patient and explained procedure to the client -	____	____
3. Assembled equipment -	____	____
4. Selected appropriate vacutainers -	____	____
5. Selected appropriate site -	____	____
6. Applied tourniquet -	____	____
7. Cleansed skin and allowed it to dry -	____	____
8. Inserted needle with bevel up -	____	____
9. Correctly punctured vacutainer tube -	____	____
10. Obtained adequate blood specimen(s) -	____	____
11. Released tourniquet -	____	____
12. Applied pressure with a sterile dry cotton ball and removed needle -	____	____
13. Instructed the client to apply pressure and elevate arm -	____	____
14. Applied bandage or a strip of tape after bleeding had stopped -	____	____
15. Labeled specimens and checked lab slips for completeness -	____	____
16. Disposed of needle pnoperly -	____	____
17. Cleaned area -	____	____
18. Washed hands -	____	____

Criteria: Competence will be recognized when the student is able to perform a venipuncture, obtain a specimen and complete lab slips according to the instructor's guidelines and the achievement indicators.

Tools and Equipment:

Plastic vacutainer holder; selection of vacutainers; vacutainer needles. antiseptic swabs; tourniquets; injectable arm (simulator); lab slips; labels; a variety of patient orders; sterile cotton balls; bandages or tape; OPTIONAL: amber tubing and material to cover it for mass practice (use 5x9 or larger toweling or chux strips)

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Obtain module.
2. Prepare a variety of patient orders for blood work.	2. Read assignments.
3. Assemble equipment.	3. Observe demonstration.
4. For mass practice obtain amber rubber tubing and have students place it under paper toweling or small chux squares. Have them practice with you after first demonstration.	4. Obtain equipment.
5. Assign work groups for student practice over several days.	5. Practice with instructor using amber tubing covered by paper/plastic chux or toweling.
6. Evaluate students.	6. Work with assigned group on injectable are (similar).
7. Prepare and give post test.	7. Practice selecting the correct vacutainers for the orders given.
8. Prepare parent permission slips for students under 18 to have their blood drawn.	8. Have instructor evaluate you on simulator.
	9. Secure a permission slip for parents to sign if under 18.
	10. Draw specimen on classmate and then have one drawn.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 49

Task: Drape patient.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands before and after procedure -	____	____
2. Assisted patient to undress -	____	____
3. Provided gown for patient (if necessary) -	____	____
4. Positioned patient according to the type of examination-	____	____
5. Placed sheet/paper drape over patient (only part to be examined should be exposed) -	____	____
6. Removed drape, and assisted patient from table -	____	____
7. Disposed of drape in manner prescribed by office -	____	____

Criteria: Competence in the task will be recognized when the student has demonstrated draping a patient with all areas covered except area to be examined.

Tools and Equipment:

Patient gowns; sheet/paper drape; examination table; hand towels

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Present a lecture/discussion on this task.	1. Take pre/post test.
2. Give demonstration.	2. Read modules/textbooks.
3. Arrange for practice sessions using student peers for "patients".	3. Observe filmstrips.
4. Present audio-visual materials.	4. View audio-visual materials.
5. Present filmstrip on positioning/ draping a patient.	5. Role play with peers (practice assisting patients. Practice instructing patient).
6. Evaluate student's demonstration.	6. Demonstrate skill for instructor.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 50

Task: Perform visual acuity tests.

Achievement Indicators: The learner:

	Yes	No
1. Identified and explained procedure to patient -	____	____
2. Placed the distance acuity chart 20 feet from the client -	____	____
3. Instructed the client to cover one eye at a time for testing and to keep both eyes open -	____	____
4. Waited briefly between testing other eye -	____	____
5. Stood beside chart -	____	____
6. Started with larger symbols and progressed to the smaller -	____	____
7. Observed the client's behavior -	____	____
8. Recorded properly using correct fractions and eye symbols -	____	____
9. Instructed the client on near vision chart -	____	____
10. Observed and recorded results -	____	____
11. Assisted the client to use the color charts -	____	____
12. Recorded results -	____	____

Criteria: Competence will be recognized when the student is able to assist the patient in visual testing according to the achievement indicators as determined by the instructor.

Tools and Equipment:	**Resources:**
Distance acuity chart; "E" chart; snellen chart; pediatric picture chart; color vision charts; near vision acuity chart	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module/tests. 2. Review module and written assignments with students. 3. Have a guest speaker or visit an ophthalmologist's office to learn modern eye care. 4. Demonstrate lab procedures. 5. Assign student partners. 6. Supervise student practice. 7. Evaluate students. Note: Include a picture of a tonometer in your module if your text does not have one.	1. Secure module. 2. Read assignments. 3. Go on field trip or have speaker. 4. Observe demonstration. 5. Practice with a partner. 6. Have instructor evaluate performance 7. Take post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 51

Task: Prepare patient for catheterization.

Achievement Indicators: The learner:	Yes	No
1. Washed hands -	____	____
2. Identified and explained the procedure to the patient -	____	____
3. Maintained aseptic technique throughout the procedure -	____	____
4. Assembled materials and prepared sterile tray -	____	____
5. Poured antiseptic solution into container; avoid spilling solution on the tray -	____	____
6. Place lubricant onto sterile sponge on tray -	____	____
7. Cover tray with sterile towel/barrier -	____	____
8. Place tray in examination room -	____	____
9. Position and drape the patient -	____	____
10. Adjust light and stool -	____	____
11. Assist doctor -	____	____

Criteria: Competence in this task will be recognized when the student has demonstrated preparing for catheterization exactly as presented in modules, textbooks and instructor demonstration.

Tools and Equipment:

Catheter (sterile); sterile gloves; lubricant; gauze squares (4x4); sterile container; 2-emesis basins; antiseptic solution; 2-sterile towels

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post test.	1. Take pre/post test.
2. Present filmstrip on catheterization.	2. Observe film strips.
3. Prepare and distribute hand-out/ modules.	3. Practice setting up trays.
4. Present demonstration.	4. Practice sterile techniques.
5. Evaluate student demonstration.	5. Attend instructor demonstration.
	6. Demonstrate task for evaluation for instructor.

Duty: Performing Clinical Tasks	**Duty No.** M **Task No.** 52

Task: Prepare patient for minor surgery.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands before and after procedure -		
2. Used communication skills to reassure patient -		
3. Positioned patient for comfort, safety and exposure of surgical site -		
4. Placed equipment for easy accessibility, out of sight of patient -		
5. Shaved surgical site, if necessary -		
6. Cleansed site with antiseptic soap and sterile water -		
7. Draped patient, only surgical site is exposed -		
8. Removed all equipment -		
9. Assisted the patient to undress and dress -		

Criteria: Competence in the task will be recognized when the patient and surgical site have been prepared according to the guidelines presented in modules, textbooks and the instructor's demonstration.

Tools and Equipment:	**Resources:**
Small sponge basin, several gauze sponges (4x4); disposable safety razor and blades; soapy antiseptic solution; emesis basin	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and present pre/post test. 2. Provide filmstrip. 3. Demonstrate preparing a patient for surgery. 4. Lecture on procedure and asepsis. 5. Prepare and present task sheets. 6. Observe student practice prepping. 7. Evaluate student demonstration.	1. Read modules/textbooks. 2. Take pre/post test. 3. View film strips. 4. Observe teacher demonstration. 5. Practice positioning (patient should be positioned so surgical site is accessible). 6. Practice draping (only surgical site should be exposed). 7. Practice communication skills (procedure should be explained to patient in easy to understand language and to reassure patient). 8. Role play assisting patient and positioning. 9. Practice setting up a prep tray.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 53

Task: Prepare room for minor surgery.

Achievement Indicators: The learner:

		Yes	No
1.	Remove all unnecessary equipment and articles -	____	____
2.	Cleaned table/counter top, and furniture using a disinfectant solution -	____	____
3.	Positioned light -	____	____
4.	Placed doctor's sterile gown, mask, cap, and gloves, for accessibility -	____	____
5.	Laid out patient's gown -	____	____
6.	Placed drape on table (if needed) -	____	____
7.	Prepared medication -	____	____
8.	Placed sterile, covered instruments tray in easy to reach position -	____	____
9.	Placed sterile pick-up forceps within easy reach -	____	____

Criteria: Competence in the task will be recognized when the student has demonstrated preparing a room for minor surgery. All procedures must be performed exactly as presented in modules, textbooks, and demonstrated by instructor.

Tools and Equipment:

Basin; soft cloth; warm water with antiseptic solution; gowns; masks; drapes; sterile tray; sterile pick-up forceps

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post test. 2. Present filmstrip on procedure. 3. Present demonstration/lecture. 4. Evaluate student demonstration.	1. Take pre/post test. 2. Observe filmstrips. 3. Practice preparing a room for minor surgery. 4. Observe instructor demonstration. 5. Demonstrate task for instructor's evaluation.

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 54

Task: Assist doctor with minor surgery.

Achievement Indicators: The learner:	Yes	No
1. Washed hands -	____	____
2. Obtained sterile tray (tray should remain wrapped until ready to use) -	____	____
3. Obtained and placed all sterile instruments on tray (instruments should remain wrapped until ready to use) -	____	____
4. Carried all instruments into exam room -	____	____
5. Placed instruments for easy accessability -	____	____
6. Assisted patient to undress -	____	____
7. Positioned and draped (only area to be treated should be exposed) -	____	____
8. Opened package containing gown -	____	____
9. Demonstrated a surgical scrub -	____	____
10. Removed gown from package and donned -	____	____
11. Opened package containing sterile tray; removed tray without contaminating -	____	____
12. Opened package containing sterile towel and placed on tray (only corners should be touched to avoid contamination) -	____	____
13. Unwrapped sterile instruments and placed in center of sterile towel (student may use handling forceps or peel package open and drop onto tray) -	____	____
14. Covered tray with sterile towel (using same technique as for field towel) -	____	____
15. Opened sterile syringe (syringe remains in package until ready to use) -	____	____
16. Put on sterile gloves -	____	____

	Yes	No
17. Removed syringe from package and inserted anesthetic bottle -		
18. Withdrew required amount -		
19. Unscrewed needle and left in bottle -		
20. Replaced needle with new needle (leave needle in holder) -		
21. Placed onto sterile field -		
22. Assisted doctor to glove (if necessary) -		
23. Received instruments as they were used or became bloody or soiled -		
24. Removed bloody sponges -		
25. Placed all soiled instruments in container out of sight of patient -		
26. Removed all instruments -		
27. Removed all sponges (wrapped before discarding) -		
28. Removed drapes -		
29. Assisted patient -		
30. Soaked instruments in antiseptic solution until ready to wash -		
31. Cleaned exam room -		

Criteria: Competence in this task will be recognized when the student demonstrated all procedures exactly as presented in modules, textbooks and instructor's demonstration.

Tools and Equipment:

Sterile instruments; gowns; trays and drapes; local anesthetic; needles (25 and 22); sterile gloves; syringes (2-4cc); sterile bandages; other materials as needed

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre/post tests. 2. Provide necessary instruments. 3. Show filmstrips on assisting in minor surgical procedures. 4. Demonstrate sterile techniques. 5. Observe role play. 6. Evaluate student's demonstration.	1. Take pre/post test. 2. Read modules/textbooks. 3. Attend instructor's lectures. 4. Observe instructor's demonstration. 5. Set-up sterile trays for minor surgical procedures. 6. Practice sterile techniques in handling instruments. 7. Role play with peers. 8. Practice preparing self for assisting (putting on gown, mask, gloves). 9. Practice performing surgical scrub. 10. Demonstrate mastery of skill for an instructor for evaluation.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 55

Task: Assist with proctoscopic examination.

Achievement Indicators:	The learner:	Yes	No
1.	Washed hands before and after procedure -	____	____
2.	Assembled equipment and supplies -	____	____
3.	Adjusted light and stool for physician -	____	____
4.	Assisted patient to undress -	____	____
5.	Positioned patient for easy accessibility to rectum -	____	____
6.	Draped patient to avoid unnecessary exposure -	____	____
7.	Assisted doctor:		
	a. putting on gloves	____	____
	b. passing instruments -	____	____
	c. receiving instruments -	____	____
	d. removing instruments from patient's view -	____	____
8.	Assisted patient up after examination (this should be done slowly in case patient is dizzy) -	____	____
9.	Helped patient to dress -	____	____
10.	Removed all equipment -	____	____
11.	Cleaned room -	____	____
12.	Charted results -	____	____

Criteria: Competence in this task will be recognized when the student has demonstrated assisting techniques according to modules, textbooks and instructor demonstration.

Tools and Equipment:	**Resources:**
Sigmoidoscope; anoscope; rectal speculum; insufflator; suction pump and tip; probe with bulb tip; gloves; finger cots; long cotton applicator; lubricating jelly; gauze sponges; basin of water	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post test.	1. Take pre/post test.
2. Prepare modules on proctoscopic examinations and purposes of exams.	2. Read assigned materials for this task.
3. Provide chapters in textbooks on proctoscopic exams.	3. Attend lectures/discussion on assisting a proctoscopic exam.
4. Set-up and present audio-visual material relating to proctoscopic examinations.	4. View audio-visual material on positioning a patient for a proctoscopic exam.
5. Give lecture on procedure and purpose of examinations.	5. Observe a demonstration of positioning a patient for a proctoscopic exam by the instructor.
6. Label instruments used in exams for identification.	6. Practice preparing a tray of instruments.
7. Observe and evaluate student demonstration.	7. Role play assisting, passing instruments, receiving instruments, and positioning a patient.
8. Administer post test related to this task and evaluate results.	8. Demonstrate skill for instructor's evaluation.

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 56

Task: Assist physician with dressing change.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands -	____	____
2. Identified and explained the procedure to the patient, when necessary -	____	____
4. Ascertained the location and type of dressing to be changed and the site exposed -	____	____
5. Opened dressing tray -	____	____
6. Poured antiseptic solution into sterile container -_	____	____
7. Positioned cuffed waterproof bag in a convenient location, out of patient's sight -	____	____
8. Adjusted the light over the dressing area -	____	____
9. Removed old dressing (gloves may be worn if drainage present) -	____	____
10. Assisted physician -	____	____
11. Removed tray after doctor has finished -	____	____
12. Secured dressing as directed -	____	____
13. Assisted patient when needed and dismissed -	____	____
14. Secured disposal bag and discarded it in a covered container -	____	____
15. Cleaned the room and supplies -	____	____
16. Replaced equipment and supplies -	____	____
17. Washed hands -	____	____
18. Charted -	____	____

Criteria: Competency will be demonstrated when the student prepares the patient, instruments, dressing supplies, and assists in a simulated situation, according to the procedure guide as determined by the instructor.

Tools and Equipment:	**Resources:**
Sterile dressing tray; mayo stand or a clean dry table; antiseptic; waterproof bag or disposable towels; tape; gooseneck lamp; sterile barrier or towels; doctor's sterile gloves; handwashing supplies; covered receptacle; chart	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare modules, tests, and evaluations.	1. Obtain a module.
2. Assemble equipment.	2. Read assigned material.
3. Review module, equipment, vocabulary.	3. View filmstrip.
4. Provide filmstrip.	4. Observe demonstration.
5. Demonstrate procedure.	5. Assemble equipment.
6. Assign student practice groups and patients.	6. Practice procedure - as a patient and as a medical assistant.
7. Observe/assist in practice.	7. Have instructor evaluate your performance when you are ready.
8. Evaluate student performance.	8. Clean and return equipment.
	9. Take post test.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 57

Task: Change a sterile dressing.

Achievement Indicators:

	The learner:	Yes	No
1.	Washed hands -	____	____
2.	Explained the procedure to the patient -	____	____
3.	Ascertained the location and type of dressing to be changed -	____	____
4.	Assembled equipment -	____	____
5.	Positioned the patient for exposure and accessibility of wound -	____	____
6.	Adjusted lighting (light should be focused on wound site only) -	____	____
7.	Opened dressing tray/or established a sterile field -	____	____
8.	Opened sterile supplies as indicated -	____	____
9.	Poured antiseptic solution into container with cotton balls -	____	____
10.	Added sterile dressing supplies to the sterile field -	____	____
11.	Added sterile ointment to tray, if necessary -	____	____
12.	Positioned cuffed water proof waste bag in a convenient location, out of sight of patient and accessible without reaching over sterile field -	____	____
13.	Loosened the tape and removed soiled dressing with a clean glove or forceps (if dressing is stuck, soak off with sterile normal saline, or as directed by the physician) -	____	____
14.	Noted type of drainage and the amount -	____	____
15.	Discarded the glove or forcep -	____	____
16.	Inspected the wound site for amount of healing and general appearance -	____	____

	Yes	No
17. Opened and put on sterile gloves (maintained sterile technique throughout entire procedure) -	____	____
18. Cleansed wound using one gloved hand, from top to the bottom or from center outward in ever widening circles -	____	____
19. Drop the sterile dressing material over the wound, using the remaining sterile gloved hand -	____	____
20. Discarded gloves in the waste bag -	____	____
21. Secured bandage with tape/or binder -	____	____
22. Assisted patient off of table -	____	____
23. Removed all soiled materials and instruments -	____	____
24. Charted findings and results -	____	____

Criteria: Competence will be recognized when the student is able to apply a sterile dressing to a simple wound demonstrating sterile techniques as outlined in the achievement indicators.

Tools and Equipment:
Handwashing supplies; antiseptic solution/or swabs; sterile dressing tray; waste bag; clean gloves; sterile gloves; lifting forceps; light; sterile dressings

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare pre/post test.	1. Take pre/post tests.
2. Present filmstrip.	2. Observe film strips.
3. Prepare and distribute hand-outs/ modules.	3. Read textbooks.
4. Present demonstration.	4. Practice sterile techniques.
5. Evaluate student demonstration.	5. Attend instructor demonstration.
	6. Demonstrate task for evaluation for instructor.

Duty: Performing Clinical Tasks

Duty No. M

Task No. 58

Task: Perform eye instillation.

Achievement Indicators: The learner:

	Yes	No
1. Washed hands -	____	____
2. Assembled equipment -	____	____
3. Identified and explained procedure to patient -	____	____
4. Positioned patient -	____	____
5. Instructed patient to look up and exposed the lower conjunctival sac. If patient was unable to hold lid open, pulled down only lower lid while patient looked up -	____	____
6. Inserted medication according to instructions -	____	____
7. Instructed patient to close eyes and rotate eyeballs -	____	____
8. Wiped eyelid from inner to outer -	____	____
9. Recorded results -	____	____
10. Returned equipment -	____	____
11. Washed hands -	____	____

Criteria: Competence will be recognized when the student is able to instill eye drops and ointment in a simulated situation, according to the achievement indicators as determined by the instructor.

Tools and Equipment:

Tissue; eye drops; eye ointment; simulator doll

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module.	1. Secure module.
2. Assemble equipment.	2. Read assigned material.
3. Secure manikin.	3. Observe demonstration.
4. Discuss common types of medication, eye conditions and general eye care principles.	4. Practice procedure.
5. Demonstrate procedures for drops and ointments.	5. Have instructor evaluate your performance.
6. Observe and assist with practice.	
7. Evaluate students.	

Duty: Performing Clinical Tasks

Duty No. M

Task No. 59

Task: Perform ear instillation.

Achievement Indicators:

The learner:	Yes	No
1. Washed hands -		
2. Assembled equipment -		
3. Identified and explained the procedure to the patient -		
4. Positioned the patient on unaffected side -		
5. Filled dropper correctly -		
6. Straightened the ear canal- adult or child -		
7. Placed the correct number of drops in the ear canal -		
8, Placed cotton in ear canal only if instructed by physician -		
9. Recorded results -		
10. Returned equipment -		
11. Washed hands -		

Criteria: Competence will be recognized when the student prepares and instills ear medication in a simulated situation according to the achievement indicators as determined by the instructor.

Tools and Equipment:

Ear drops (sterile, normal saline in dropper bottle); medication order sheet; cotton balls

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare module and tests.	1. Secure module.
2. Assemble equipment.	2. Complete assigned reading.
3. Secure a simulator manikin.	3. Observe a teacher demonstration.
4. Review principles, common types of drugs, and ear conditions.	4. Practice procedure in student work group.
5. Demonstrate procedure.	5. Have instructor evaluate.
6. Assign students to work groups to critique each other's practice.	
7. Evaluate student performance.	

Duty: Performing Clinical Tasks	**Duty No.** M
	Task No. 60

Task: Administering parenteral injection, intramuscular injection, and sub-q (hypodermic) indradermal injection.

Achievement Indicators: The learner:	Yes	No
1. Washed hands -	____	____
2. Identified patient and explained procedure -	____	____
3. Selected the appropriate syringe/needle, plain or tubex -	____	____
4. Obtained the correct medication -	____	____
5. Read the label 3 times -	____	____
6. Prepared an accurate dose -	____	____
7. Selected the appropriate sites -gluteus medius, ventral gluteal, deltoid, vastus lateralis -	____	____
8. Communicated well with the patient -	____	____
9. Cleansed the skin and air dried -	____	____
10. Inserted at the correct angle -90° or "Z" tract -	____	____
11. Aspirated (I.M. and subcutaveous) -	____	____
12. Destroyed and disposed the needle and syringe -	____	____
13. Injected medication -	____	____
14. Recorded -	____	____
15. Cleaned area -	____	____

Criteria: Competence is recognized when the student is able to perform all of the parenteral injections, according to the achievement indicators as determined by the instructor.

Tools and Equipment: Selection of needles/syringes; antiseptic swabs; simulated medications; simulated doctor's orders; dystructor-clip; red contaninated box; chart	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare modules and test.	1. Secure module.
2. Assemble equipment (for larger classes prepare practice packs of needles and syringes for each student- this eliminates traffic and wasted time).	2. Read assignments. 3. Observe filmstrip. 4. Participate in lecture discussion.
3. Students may use oranges or prepare a cotton or dacron batting material by placing it in a plastic sandwich bag for injection over selected body sites.	5. Observe demonstration. 6. Obtain equipment. 7. Practice with a partner.
4. Secure filmstrips.	8. Have instructor evaluate you.
5. Lecture/discussion.	9. Take post test.
6. Supervise student practice.	
7. Evaluate students.	
8. Administer post test.	

Duty: Performing Clinical Tasks

Duty No. M

Task No. 61

Task: Administer oral medication.

Achievement Indicators: The learner:	Yes	No
1. Washed hands -	____	____
2. Worked in a quiet, well-lit atmosphere -	____	____
3. Selected the correct medication from the shelf, and checked the drug label -	____	____
4. Checked the expiration date -	____	____
5. Compared the medication with the physician's instructions -	____	____
6. Calculated the correct dosage to be given, if needed -	____	____
7. Removed the bottle cap -	____	____
8. Checked the drug label and poured the medication -	____	____
SOLID MEDICATIONS:		
1. Poured the correct number of capsules or tablets into the bottle cap -	____	____
2. Transferred the medication to a medicine cup -	____	____
LIQUID MEDICATIONS:		
1. Placed the lid of the bottle upside down on a flat surface with the open end facing up -	____	____
2. Palmed the surface of the label -	____	____
3. Placed the thumbnail at the proper calibration on the medicine cup -	____	____
4. Held the medicine up at eye level -	____	____
5. Poured the medication and read the dose at the lowest level of the meniscus -	____	____
9. Checked the drug label and returned the medication to the shelf -	____	____

Teacher Activities	Student Learning Activities
1. Prepare module. 2. Prepare simulated drugs and doctor's orders. 3. Review safety principles. 4. Demonstrate procedure. 5. Teaching usage of PDR is useful here- assign 20 commonly used drugs and have students look them up and write the action, usage, and side effects. 6. Evaluate student performance.	1. Secure module. 2. Read assignments. 3. Participate in class discussion. 4. Observe demonstration. 5. Practice. 6. Have instructor evaluate performance. 7. Take post test.

	Yes	No
10. Instructed patient to take it with adequate water -	____	____
11. Recorded medication -	____	____

Criteria: Competence will be recognized when the student is able to give oral medications to a patient according to the achievement indicators as determined by the instructor.

Tools and Equipment:

Liquid medication (simulated); salt tablets (simulated labels); medicine cups (liquid measure, plain); simulated order

Resources:

See Bibliography.

CERTIFICATE OF ACHIEVEMENT

____
(Name of School or Skill Center)

recognizes ______________________ for completing

instruction in an approved vocational/technical

______________________________ program.
(Name of Program--Steno/Clerical,Legal, Medical)

__________________________ is capable of performing
(Name of Student)

tasks in the following occupations:

The student's level of achievement is identified by tasks on the Achievement Record.

Number of Course Hours	____	Administrator	________________	____ Date
Number of Course Hours Student Completed	____	Instructor	________________	____ Date
Number of Hours Student Completed in Co-Op Work Experience Program	____			

This certificate is recommended for Secretarial and Related Occupations (07.0601 and 17.503) program graudates statewide.

STUDENT ACHIEVEMENT RECORD

MEDICAL SECRETARY AND
MEDICAL OFFICE ASSISTANT

STUDENT ____

INSTRUCTIONS:

Mark each student's level of competence according to the following guide:

LEVEL	GUIDE
1	Student has been exposed to task
2	Task accomplished with assistance
3	Task accomplished to criteria by student
4	Ability to teach or demonstrate the task to others

TASK	LEVEL	DATE
A. RECEIVING, INTERVIEWING, AND INFORMING PEOPLE		
1. Receive people.		
2. Collect information.		
3. Answer questions to provide information.		
4. Schedule appointments.		
5. Convey messages.		
6. Question originator to determine task requirements		
of orginator.		
7. Escort people using inhouse procedures.		
B. PERFORMING TELEPHONE OPERATIONS		
1. Receive calls.		
2. Place calls.		
C. PREPARING AND DISTRIBUTING MAIL		
1. Process incoming mail.		

TASK	LEVEL	DATE
C. PREPARING AND DISTRIBUTING MAIL (con't)		
2. Process outgoing mail .		
D. PERFORMING ACCOUNTING, BANKING, CREDIT AND PAYROLL FUNCTIONS		
1. Receive cash.		
2. Count cash.		
3. Receive checks.		
4. Accept credit card.		
5. Issue receipt.		
6. Deposit cash and checks.		
7. Open/close accounts.		
8. Prepare statements/bills.		
9. Control overdue accounts.		
10. Process unredeemed/dishonored checks.		
11. Reconcile bank statements.		
12. Compile fee schedules.		
13. Prepare checks.		
14. Control petty cash fund.		
15. Prepare payroll.		
16. Prepare tax reports.		
E. PREPARING DOCUMENTS, CORRESPONDENCE, AND REPORTS		
1. Take dictation.		
2. Transcribe dictated material.		
3. Compose correspondence to communicate information to correspondent.		
4. Compose correspondence to request information from the correspondent.		
5. Produce documents.		
6. Prepare worksheets.		
7. Gather data.		
8. Compile records.		
9. Type information.		

TASK	LEVEL	DATE
E. PREPARING DOCUMENTS, CORRESPONDENCE, AND REPORTS		
10. Format information.		
11. Proofread documents.		
12. Arrange data.		
13. Categorize data.		
14. Prioritize jobs.		
15. Record information.		
F. MAINTAINING FILES, RECORDS, AND LOGS		
1. Maintain records.		
G. DUPLICATING AND ASSEMBLING DOCUMENTS		
1. Copy data.		
2. Duplicate documents.		
3. Photograph documents.		
4. Collate documents.		
5. Bind documents.		
H. PERFORMING WORD PROCESSING		
1. Load software.		
2. Input information to record documents.		
3. Input information to store documents.		
4. Enter stored media to retrieve/recall text.		
5. Enter stored media to communicate information.		
6. Enter stored media to revise text.		
7. Enter instructions to print documents.		
8. Originate forms.		
9. Program document format.		
10. Program forms.		
11. Process management records.		
12. Locate information.		
13. Retrieve information.		
14. Select blocks of information.		
15. Assemble information from any media.		

TASK	LEVEL	DATE
H. PERFORMING WORD PROCESSING (con't)		
16. Sort information.		
17. Manipulate files.		
18. Perform mathematical calculations.		
19. Perform media maintenance routines.		
I. MAINTAINING INVENTORY		
1. Maintain stock.		
J. MAINTAINING MACHINES AND OFFICE EQUIPMENT		
1. Analyze equipment malfunction.		
2. Perform equipment maintenance functions.		
3. Repair equipment.		
4. Schedule equipment maintenance.		
K. PERFORMING MEDICAL SPECIALTIES		
1. Maintain medical office library.		
2. Process out-of-office studies.		
3. Complete medical forms.		
4. Prepare medical reports.		
L. SUPERVISING AND TRAINING		
1. Interview applicants.		
2. Maintain personnel records.		
3. Maintain policy/procedures manual.		
4. Orient new employees.		
5. Establish employee performance measurements.		
6. Establish staffing patterns and schedule staff.		
7. Schedule work assignments.		
M. PERFORMING CLINICAL TASKS		
1. Perform aseptic handwashing techniques.		
2. Open a sterile tray cover and remove sterile barrier.		
3. Disinfect instruments (chemical).		

TASK	LEVEL	DATE
M. PERFORMING CLINICAL TASKS (con't)		
4. Clean and restock examination room.		
5. Wrap instruments for sterilization.		
6. Unwrap or open sterile packages and maintain sterility of contents.		
7. Sterilize supplies using the dry heat method.		
8. Sanitize instruments.		
9. Sterilize supplies and instruments using the autoclave (moist heat with pressure) method.		
10. Pour a sterile solution.		
11. Apply sterile gloves.		
12. Using sterile transfer forceps.		
13. Support an ambulating client.		
14. Pull a client to a standing position.		
15. Operate a wheelchair.		
16. Administer spirits of ammonia.		
17. Position a faint client.		
18. Treat a burn.		
19. Perform cardiopulmonary resuscitation.		
20. Apply direct pressure to a pressure point.		
21. Apply bandages.		
23. Apply roller bandages.		
24. Apply tubular bandage.		
25. Assist a physician.		
26. Perform routine biochemical tests.		
27. Perform specific gravity.		
28. Collect a specimen of body discharge.		
29. Label a specimen from a client.		
30. Measure body weight.		
31. Measure body height.		
32. Assess pulse.		
33. Measure a temperature.		
34. Assess respiration.		
35. Measure blood pressure.		

TASK	LEVEL	DATE
M. PERFORMING CLINICAL TASKS (con't)		
36. Perform E.K.G./E.C.G. test.		
37. Mount E.K.G./E.C.G. graphs.		
38. Clean E.K.G. equipment after use.		
39. Assist with a papaniculous smear.		
40. Preparation of slide for differential count.		
41. Perform white blood count.		
42. Perform red blood count.		
43. Use the microscope.		
44. Prepare urine for microcopic examination.		
45. Obtain a capillary blood specimen.		
46. Perform hematocrit test (microhematocrit method).		
47. Perform venipuncture (syringe method).		
48. Perform venipuncture (vacuum method).		
49. Drape patient.		
50. Test visual acuity.		
51. Prepare for catheterization.		
52. Prepare patient for minor surgery.		
53. Prepare room for minor surgery.		
54. Assist doctor with minor surgery.		
55. Assist with proctoscopic examination.		
56. Assist physician with dressing change.		
57. Changing a sterile dressing.		
58. Perform eye instillation.		
59. Perform ear instillation.		
60. Administer injections.		
61. Administer oral medication.		

CLASS ACHIEVEMENT RECORD

NAME TASK No.																																

MEDICAL RESOURCES

I. Audio Visual Resources For Medical Secretaries

Slide-Tape Sets:

B & 0-80-207 Wanted: Medical Office Assistants, State Fair Community College.

Communications in the Job Search (PEP-106), Media Center, State Fair Community College, 1900 Clarendon Road, Sedalia, MO 65301.

The Interview and Followup, (PEP-107), State Fair Community College.

Introduction To Telecommunications, National Instructional Systems, Incorporated, P.O. Box 1177, Huntington Beach, CA 92647.

Processing Incoming and Outgoing Mail, Milady Publishing Company , (MPC).

The Resume, (PEP-105), State Fair Community College.

Techniques for Proofreading and Making Corrections, Milady Publishing Company, (MPC).

Telephone Expertise, Allison Associates, Box 313, Troy, MI 48084.

Telephone Techniques for the Secretary, Milady Publishing Company, 3839 White Plains Road, Bronx, NY 10467.

The Doctor...You and The Multi-Button Telephone, Allison Associates, Box 313, Troy, MI 48084.

Slides:

Career Pak (1 and 2) Slide Presentation, A.B. Dick Company, 5700 West Touhy Avenue, Chicago, IL. 60648.

Cassette Tapes:

Basic Medical Terminology, Bobbs-Merrill Educational Publishing, 4300 West 62nd Street, Indianapolis, IN 46206.

*Co-Existence: Administration & Medical Staff, Charlotte O. Cochrane, Director, Medical Staff Support Services, Rio Hondo Memorial Hospital, Downey, CA, Cassius Ellis, III, MD, Immediate Past Chief of Staff, Mount Sinai Hospital, Minneapolis, MN, Bert Waller, Jr. Associate Administrator, Methodist Hospitals of Dallas, TX.

Comprehensive Machine Transcription Course, Dictation Disc Company, 240 Madison Ave., New York, NY 10016.

Dictation Recordings for All Points Relocation Service, Gregg/McGraw-Hill Book Company.

Dictation Recordings for Word Processing Concepts and Applications, Gregg/McGraw-Hill Book Company, 1221 Avenue of the Americas, NY 10020.

Effective Telephone Techniques, Cassettes Unlimited, Roanoke, VA.

The IBM Electronic Typewriter, Western Tape, 2761 Marine Way, P.O. Box 69, Mountain View, CA 94042.

*Implementing A Quality Assurance Program, William R. Fifer, MD, Professor, Center for Health Services Research, University of Minnesota, (two-tape set).

*Information Exchange, Joan Covell-New Physician Orientation; Joan Smith-Follow-up Medical Staff Action; Patricia Alyward-CME In The Community Hospital; Patricia Starr-Medical Staff Newsletters; Jeanne Payne-Managing The MSO Staff, Supervision/Delegation.

Machine Transcription Word Processing, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Medical Dictation and Transcription, Cassette Programs for More Effective Learning from ESP, Jonesboro, AR 72401.

*Medical Staff Law, Lawrence Kessenick, Esq., Law Partner, Hanson, Bridgett, Marcus, Milney & Vlahos, San Francisco, CA (2-tape set).

Medical Vocabulary from A to Z, Western Tape, 2761 Marine Way, P.O. Box 69, Mountain View, CA 94042.

*Meeting JCAH Standards, Natalie Caudill, Medical Records Consultant, Atlanta, GA (two-tape set).

*MSO And The Role of The CMSS, A Chief of Staff's View, Edwin C. Evans, M.D., Atlanta, GA.

*Organizing The Medical Staff Office, Charlotte O. Cochrane, Director, Medical Staff Support Services, Rio Hondo Memorial Hospital, Downey, CA.

*Principles Of Medical Staff Organization, Richard E. YaDeau, MD, St. Paul. MN.

Proofreading, Western Tape, 2761 Marine Way, P.O. Box 69, Mountain View, CA 94042.

Punctuation For Everybody--Western Tape, P.O. Box 69, Mountain View, CA 94040.

*Role Of Outside Agencies In Medical Office Management, James A. Rice, Vice President, Health Control, Incorporated, Minneapolis, MN.

Simulation Recordings For Medical Office Procedures, Gregg/McGraw-Hill Book Company.

Telephone Dynamics, Western Tape, 2761 Marine Way, P.O. Box 69, Mountain View, CA 94042.

Word Division, Western Tape, 2761 Marine Way, P.O. Box 69, Mountain View, CA 94040.

* National Association-Medical Staff Services, Cassette Tape Program,
available from: Val Burris
Executive Secretary/Medical Staff Secretary
St. Joseph Medical Center
3600 East Harry Street
Wichita, KS 67218

Transparencies:

3M Transparencies: Clerical Occupations, 3M Company, 3M Center, St. Paul, MN.

Career Planning.

Copying and Duplicating.

Effective Human Relations.

Personality and Appearance in the Office.

Procedures in the Office.

Typing Fundamentals.

Modern Office Procedures Transparencies: Pitman Learning, Incorporated, 6 Davis Drive, Belmont, CA 94002.

Business & Office Organization.

Departmental Organization And Operation.

The Receptionist--Personal Efficiency.

Personal Development Transparencies, South Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227:

K-402 Dress Ability.

K-403 Employ-Ability.

K-404 Ethics-Ability.

K-405 Image-Ability.

K-406 Job-Getting Ability.

K-408 Promote-Ability.

K-409 Quality Ability.

K-412 Success-Ability.

K-413 Time-Ability.

Films:

Beautiful Girls--Sally Hawkins, Machine Army (These two films are especially good for secondary level), Fine Art (Management oriented), Herman Miller. Contact your local distributor for use.

Breaking The Production Barrier, From Thoughts To Words To Action, Opportunity Word Processing, System 6. Contact your local IBM salesman for use.

Word Processing, slides, filmstrip, or cassettes, purchase, preview, with Instructor's Guide, Robert J. Brady Company. A Prentice Hall Company, Bowie, MD 20715.

Word Processing Films. Ten 16mm films, color, Information Management Corporation, P.O. Box 2076, Green Bay, WI 54306; with Word Processing Instructor's Guide.

1. Dictation- Napoleon To Now (12 minutes).
2. "In" Side Word Processing (9 minutes).
3. It's Really People (12 minutes).
4. Kissing The "Girls" Goodbye (13 minutes).
5. "Out" Side Word Processing (13 minutes).

6. The Pivot Point (12 minutes).
7. The Rules Of The Game (11 minutes).
8. Take It From The Top (15 minutes).
9. What's It All About (11 minutes).
10. Worries And Wonder (12 minutes).

Word Processing: Office Of The Future, Media Systems Corporation, 757 Third Avenue, New York, NY 10017.

II. Curriculum Guides And Other References For Medical Secretaries

Analysis Of Secretarial Positions In Word Processing Settings, Albert S. Thompson and Donald E. Super. New York: Columbia University (1976).

An Analysis Of The Word Processor Occupation, L. Knupke, The Ohio State Univesity Instructional Materials Laboratory (1975).

Career Alternative Packet: Word Processing, University of Maryland, Department of Industrial Education (1977).

A Catalog Of Performance Objectives, Criterion-Referenced Measures, and Performance Guides For The Correspondence Word Processing Specialist, University of Maryland, Department of Industrial Education (1977).

A Catalog Of Performance Objectives, Criterion-Referenced Measures, And Performance Guides For Secretarial, Stenographic, Typing, and Related Occupations. Virginia Polytechnic Institute and State University, Blacksburg, VA (1975).

The Development Of Word Processing And Its Implications For The Business Education Profession, Scott Ober, 1972, available from ERIC Document Reproduction Service, P.O. Box 190, Arlington, VA 22210, (ED 068 648).

Luther Burbank Senior High School ROP Secretary/Word Processing Course, Patricia Duschka. Luther Burbank Senior High School, Business Education Regional Occupational Program, 3500 Florin Road, Sacramento, CA 95800.

Office Proofreading And English Mechanics: Mini-Manual, Series I, New Mexico State Department of Education, Education Building, Santa Fe, NM 87501, (1976).

Regional Occupational Program (ROP) Instructional Objectives For Word Processing, San Mateo County Office Of Education, 1845 Rollins Road, Burlingame, CA 94010 (1976).

Resource Guide For Performance-Based Word Processing Instruction, Gerald F. Day, Project Director, University of Maryland, Department of Industrial Education, College Park, MD 20742.

Word Processing Curriculum, School Districts of Philadelphia, Division of Vocational Education, Business Education, 21st and Parkway, Philadelphia, PA 19104 (1975).

Word Processing Curriculum, Janette Garofalo et al., Connecticut State Department of Education, BOE Vocational Division, Room 344, State Office Building, P.O. Box 2219, Hartford, CT 06115.

Word Processing Curriculum, Minnesota Department of Education, Business and Office Education, Capital Square Building, 550 Cedar Street, St. Paul, MN 55101.

Word Processing Curriculum Guide, Marcia Anderson and Robert Kusek, Illinois Office of Education, Department of Adult, Vocational and Technical Education, Springfield, IL 62701 (now available through NBEA).

Word Processing Curriculum Guidlines, South Carolina Office of Vocational Education, Office Occupations Section, 920 Rutledge Building, Columbia, SC 29201.

Word Processing Curriculum Model And Teacher's Guide, Illinois Office of Education, Division of Adult, Vocational, and Technical Education, 1035 Outer Park Drive, Springfield, IL 62706.

III. Instruction Manuals For Medical Secretarial Courses

Instruction Manuals:

A.B. Dick Magna II Electronic Typewriter Applications. A.B. Dick Company, 5700 West Touhy Avenue, Chicago, IL 60648.

A.B. Dick Magna II Electronic Typewriter Skill/Pak. A.B. Dick Company, 5700 West Touhy Avenue, Chicago, IL 60648.

Automatic Typewriters: IBM Mag Card Selectric Typewriter, Mag Card II, Eleanor Flanigan, Media Systems Corp., Subsidiary of Harcourt Brace Jovanovich, 757 Third Avenue, New York, NY 10017.

AVT Machine Transcription, Arnold Rosen, Media Systems Coporation, Subsidiary of Harcourt Brace Jovanovich, 757 Third Avenue, New York, NY 10017.

Business English Basics, Self Instructional Approach, Moyer, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016 (1980).

CI 95S/45S Instruction Manual (For C. Itch 95S 10-key Electronic Printing Calculator). C. Itch & Company, LTD, 4.2 Chome, Hon-Cho, NI Hon Bashi, Chuo-ku, Tokyo,Japan.

Comprehensive Word Processing, (a machine transcription course) McLean & Froiland, Western Tape, P.O. Box 69, Mountain View, CA 94040.

CPT (Learning An Acquaintanceship Level), Frey, sold by Audio Visual, University of Minnesota.

CPT Text Editing Systems (CPT 8000 Operator's Manual). CPT, 7505 Highway 7, Minneapolis, MN 55426.

Dictaphone Thought Master Series 250 Dictating/Transcribing System Instruction Manual (For Dictaphone Transcriber/Dictator). Dictaphone Corporation, 120 Old Post Road, Rye, NY 10580.

Don't Write It- Dictate, Lanier Business Products, 1700 Chantilly Drive, NE, Atlanta, GA 30324 (1973).

Facit 1850 Electric Correcting Typewriter Operating Instructions. Facit-Odhner Incorporation, 66 Field Point Road, Greenwich, CN 06830.

Gestetner 420 Operating Instructions (For Gestetner Mimeo Machine). Gestetner Corporation, 22400 Telegraph Road, Southfield, MI 48034.

Gestetner Model 1100 Electronic Stencil Imager Operating Instructions. Gestetner Corporation, 22400 Telegraph Road, Southfield, MI 48034.

How To Operate The CPT (Cassette Powered Typewriter-4200), Mona J. Casady, Southwestern Missouri State University, Springfield, MO 65801. Teacher's guide also available.

IBM Electronic Typewriter 50 Operating Instructions (For IBM Electronic 50 typewriter). IBM, 26200 Lasher Road, Southfield, MI 48076.

IBM Mag Card II, Adeline Price, Western Tape, P.O. Box 69, Mountain View, CA 94040.

IBM Mag Card, Memory Typewriter Manual, IBM Word Processing. A Teacher's Guide-Memory Typewriter-Transcription Skills For Word Processing, International Business Machines Corporation, Office Products Division, Parsons Pond Drive, Franklin Lakes, NJ 07417.

The IBM Memory Typewriter, Paula Cecil, Western Tape, P.O. Box 69, Mountain View, CA 94040.

IBM Memory Typewriter Operating Instructions (For IBM Memory 50 Typewriter). IBM, 26200 Lasher Road, Southfield, MI 48076.

IBM Selectric II Typewriter Operating Instructions (For IBM Selectric II Typewriter). IBM, 26200 Lasher Road, Southfield, MI 48076.

Infrared Transparency Maker Owner's Manual (3M 45 "Secretary"). 3M Company, 3M Center, St. Paul, MN 55101.

Intensified Office Skills: Word Processing, Sylvia Myers, Winters High School, 101 Grant Avenue, Winters, CA 95694 (1976).

Lanier Individualized Instruction Course, Lanier Business Systems, 1700 Chantilly Drive, NE, Atlanta, GA 30324.

Machine Transcription by Lanier, Lanier Business Systems, 1700 Chantilly Drive, NE, Atlanta, GA 30324.

Machine Transcription Course, Dictation Disc Corporation.

Mag Card II and Memory, Student Guides, Contact Marjorie Sorenson, Golden West College.

Magnetic Tape Selectric Typewriter, Raymond F. Pieslak, Rutgers University, Vocational-Technical Curriculum Laboratory, Building 4103-Kilmer Campus, New Brunswick, NJ 08903 (1974).

New York State Machine Transcription, Western Tape, P.O. Box 69, Mountain View, CA 94040.

Olivette ET 121 Operating Instructions. South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Power Typewriting In Today's Office, Cecil, Western Tape, 2761 Marine Way, P.O. Box 69, Mountain View, CA 94040.

Redactor Editing Typewriter Dual Magnetic Card Model, Series B, Training Manual, Wagoner, McHolland, and Walker, Ball State University Bookstore, Muncie, IN 47306.

Redactor Editing Typewriter Dual Magnetic Tape Model, Series B, Training Manual, Wagoner, McHolland, and Walker, Ball State University, Muncie, IN 47306.

Sample Guidelines For Work Assignments, Levels And Career Development Of Administrative and Correspondence Secretaries, IBM Office Products Division, Parsons Pond Drive, Franklin Lakes, NJ 07417.

Selectric Typewriter Teacher's Guide; Typing Skills For Word Processing, International Business Machines, Office Products Division, Parsons Pond Drive, Franklin Lakes, NJ 07417 (1975).

Spelling Drills And Exercises, Brendel and Near, Gregg/McGraw-Hill, New York, NY 10001.

Transcription Cassette Tapes, Audio Cassettes, Lanier Business Products, 1700 Chantilly Drive, NE, Atlanta, GA 30324 (1975).

VYDEC 1200 Text Editor Learning Kit- Program Graphics.

Word Processing Learning Activity Packets, Warren Occupational Technical Center, Golden, CO 80401 (1976).

Word Processing: Machine Transcription, Johnson & Clark, Boise State University Press, Boise, ID 83707.

Word Processing Package, CPT Corporation, 1001 Second Street, South, Minneapolis, MN 55343.

IV. Professional Organizations And Societies In The Medical Field

For The Medical Secretary/Assistant:

AAMA--American Association of Medical Assistants. One East Wacker Drive, Suite 2110, Chicago, IL 60601.

AAMT--American Association of Medical Transcriptionists.

AMRA--American Medical Records Association.

AMS--Administrative Management Society. AMS Headquarters, Willow Grove, PA 19090.

ARMA--Association of Records Managers and Administrators. Suite 215, 4200 Somerset, Prairie Village, KS 66208.

AWPA--American Word Processing Association. P.O. Box 16267, Lansing, MI 48901.

FSA--Future Secretaries Association (Affiliate of PSI). 616 East 63rd Street, Kansas City, MO 64110.

IWP--International Information/Word Processing Association. 1015 North York Road, Willow Grove, PA 19090.

NAMSS--National Association of Medical Staff Services. 40 South LaGrange Road, LaGrange, Il 60525.

PSI--Professional Secretaries International (formerly National Secretaries Association). 2440 Pershing Road, Kansas City, MO 64108.

For The Doctor:

AMA--American Medical Association (sets up Code Of Ethics and Principles accepted by the medical profession).

AMS--American Medical Society (most doctors belong to this on the local level in their area).

SPBC--Society of Professional Business Consultants (used widely by doctors and assistants to help set up business end of medical practice).

For Hospital and Medical Groups:

ACGMA--American College Medical Group Administrators.

AHA--American Hospital Association (they have formed the "Patient Bill of Rights, which governs patient rights and responsibilities).

MGMA--Medical Group Management Association (an affiliate group of the ACGMA; has chapters in Michigan--must have experience and/or work training and be an administrator in a medical group).

NAMSS--National Association of Medical Staff Services (Michigan has chapters; must be coordinator, secretary or person involved with administrative functions of the medical staff in a hospital.

V. Professional Periodicals for Medical Secretaries

Administrative Management. Geyer-McAllister Publications, Incorporated. 51 Madison Avenue, New York, NY 10010.

Advanced Office Concepts. Amy D. Wohl, Editor; Advanced Office Concepts Corporation. One Bala Cynwyd Plaza, Suite 516. (215)667-5993.

The Balance Sheet. South-Western Publishing Company. 5101 Madison Road, Cincinnati, OH 45227.

Corporate Systems, United Technical Publications, Incorporated, 645 Stewart Avenue, Garden City, NY 11530.

Datamation, Technical Publishing Company, 1301 South Grove Avenue, Barrington, IL 60010.

Impact: Information Technology, Administrative Management Society, Maryland Road, Willow Grove, PA 19090, monthly.

Information and Records Management, Information and Records Management, Incorporated, 250 Fulton Avenue, Hempstead, NY 11550.

Typeworld, Blum Publications, 15 Oakridge Circle, Wilmington, MA 01887.

Viewpoint, Bulletin, Word Processing Association, Maryland Road, Willow Grove, PA 19090, published monthly, subscription included with IWP membership.

Word Processing News, Datapro Research Corporations, 1805 Underwood Blvd., Delran, NJ 08075, monthly.

Word Processing Report, Geyer-McAllister Publications, Incorporated, 51 Madison Avenue, New York, NY 10010, bimonthly.

Words, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Biographical Abstracts and Psychology Abstracts:

Bits & Pieces, Economics Press, Incorporated. 12 Daniel Road, Fairfield, NJ 07006.

Boardroom Reports; 500 Fifth Avenue, New York, NY 10110. $44/year (26 issues).

Business Education Forum, Journal of MBEA. Published eight times a year (Subscription price included in MBEA dues).

Business Education World; Published by Gregg/Mc-Graw-Hill. Service to Business Educators, 13955 Manchester Road, Manchester, MO 63011.

Business Exchange, Houghton Mifflin Company. One Beacon Street, Boston, MA 02107.

A Catalog of Performance Objectives, Performance Guides, Tools & Equipment (For Word Processing Administrative Support Secretary and Word Processing Correspondence Specialist). William J. Schurter, Technical Coordinator, V-TECS, Department of Industrial Education. University of Maryland, College Park, MD 20742.

Centergram; The National Center for Research in Vocational Education, The Ohio State University, 1960 Kenny Road, Columbus, OH 43221 (614)486-3655.

Century 21 Reporter, South-Western Publishing Company, 5101 Madison Road Cincinnati, OH 45227.

Computer Business News; 375 Cochituate Road, Box 880, Farmingham, MA 01701. Published weekly, $25/year.

Cooperative Business News, published by VEST, Incorporated, P.O. Box 2513 Hamilton Square, NJ 08690 ($7.50/year).

The Cumulative Index Medicus (annual volume).

From Nine to Five, the Dartnell Corporation. 4660 Ravenswood Avenue Chicago, IL 60640 (published monthly).

Index Medicus (a monthly bibliography of articles that have appeared in medical journals) Published by the National Library of Medicine.

Information & Records Management:

Information & Word Processing Report, Geyer-McAllister Publication, Incorporated, 51 Madison Avenue, New York, NY 10010 ($106/25 issues, $8.83/month. Subscription includes an allocation of $16 for a one-year subscription to the Word Processing & Information Systems).

Hospital Literature Index, published quarterly by AMA in cooperation with National Library of Medicine.

The Human Side and The Business Side of Medical Practice, an AMA booklet.

Information Systems News, 33 East Shore Road, Manhassett, NY 11030; Free.

Infosystems, Hitchcock Publishing Company. Hitchcock Building, Wheaton, IL 606187.

International Information/Word Processing Association. 10150 North York Road, Willow Grove, PA 19090.

JAMA (Journal of the American Medical Association, weekly).

Journal of Family Practice.

Management World, Administrative Management Society. AMS Building, Maryland Road, Willow Grove, PA 19090.

Medical Economics. Box 55, Oradell, NJ 07649 (201)262-3030. $44/year, (26 issues or $3/copy).

Medical Subject Headings (used for setting up scientific files), Michigan Association for Computer Users in Learning. Membership $5.00/year. Larry R. Smith, Wayne County Intermediate School District, 33500 Van Born Road, Wayne, MI 48184.

Publications Available to Members:

MACUL Journal (published 2-3/year), "Checkpoint" newsletter (bimonthly).

Occupations in Demand, At Job Service Offices, U.S. Department of Labor. Employment and Training Administration, Washington, D.C. 20213.

The Office. 1200 Summer Street, Stanford, CT 06904. Free.

The Office, Office Publications, Incorporated. P.O. Box 13205, Philadelphia, PA 19101.

Office Product News, 645 Stewart Avenue, Garden City, NY 11530. Published monthly.

Occupational Outlook, U.S. Department of Labor. Bureau of Labor Statistics, Washington, DC 20212. Published quarterly.

Office Topics, Published by Economics Press, Incorporated, 12 Daniel Road Fairfield, NJ 07006 ($9.00/6 months- 13 issues).

Output Alternatives--Some Consideration, Seybold Publications. Box 644, Media, PA 19063. $10 (A detailed report which compares printout quality of peripheral devices for word processing systems).

Personal Report for the Professional Secretary, Research Institute of America. 589 Fifth Avenue, New York, NY 10017.

Quick Strokes. Box 643, West Sacramento, CA 95691, published quarterly; $5/year.

Record Management Quarterly (offical publication of the ARMA).

The Secretary, NSA. Suite G-10, 2440 Pershing Road, Kansas City, MO 64108.

Shorthand Motivation Manual, A How-To Approach, Gregg/McGraw-Hill, 13955 Manchester, Manchester, MO 63011.

Telephone Personality, Economics Press, Incorporated, 12 Daniel Road Farifield, NJ 07006 ($23.14, 26 issues).

Today's Education, Journal of the National Education Association, published four times a year. National Education Association of the United States 1201 16th Street, North West, Washington, D.C. 22036.

Today's Secretary, Gregg/McGraw-Hill publication.

Viewpoints in Business and Office Education, MPC Educational Publishers. A division of Milady Publishing Corporation, 2829 White Plains Road, Bronx, NY 10467. Monthly September through April free to Business Office Education Teachers.

Voc. Ed., Journal of the American Vocational Association. Published monthly September through June. American Vocational Association, 2020 North 14th Street, Arlington VA 22201.

The Word (free with membership) Word Processing Society Incorporated. P.O. Box 92553, Milwaukee, WI 53202. $25/year membership/monthly. (use the reader service card, circle for free information. All vendors will gladly send information).

Word Processing, Minnesota State Department of Education--Vocational Technical division. Secondary Business and Office. 520A Capital Square Building, 550 Cedar Street, St. Paul, MN 55101. (612)296-4864.

Word Processing News. 812 Via Tornasol, Aptos, CA 95003. (a research newsletter devoted to reporting observation regarding office system technology and training of today and tomorrow). Published bimonthly; $50/year.

Word Processing Systems, by Geyer-McAllister. 51 Madison Avenue, New York, NY 10010; $15/year.

VI. Reference Books and Materials For Medical Secretaries

Datapro Research Corporation (W.P. Reports), Underwood Blvd., Deltran, NJ 08075.

DDC Quick Punctuation Reference; DDC, 240 Madison Avenue, NY NY 10016.

DDC Transcriber's Reference Manual; Dictation Disc Company, 240 Madison Avenue, New York, NY.

Gould's Medical Dictionary, 4th edition, P. Blackistons, Sons & Company, Incorporated. 1012 Walnut Street, Philadelphia, PA.

Gray's Anatomy, Running Press, Philadelphia, PA.

Gregg Medical Shorthand Dictionary, Gregg/McGraw-Hill Book Company, 13955 Manchester, Manchester, MO 63011.

Gregg Tests & Awards, Typing Speed Tests, Gregg/McGraw-Hill Book Company, 1221 Avenue of the Americas, New York, NY.

The Gregg Reverence Manual, Gregg/McGraw-Hill Book Company.

A Guide To Employment, Wayne County Intermediate School District, Project. Apply/Prepare, Wayne, MI.

A Guide To Grammar and Word Usage, Western Tape.

A Guide to Punctuation, Capitalization, Number Typing and Word Division, Western Tape 2761 Marine Way P.O. Box 69, Mountain View, CA.

A Guide to Typewriting Stlye and Selected Business Forms, Western Tape, 2761 Marine Way P.O. Box 69, Mountain View, CA 94040.

Legal P's & Q's In The Doctor's Office, Lawyer's Bookshelf, Bayside, NY.

The Medical & Health Sciences Word Book, Houghton-Mifflin Company, 1900 Batavia, Geneva IL 60134.

Medical Secretary's Standard Reference Handbook, Prentice Hall Incorporated, Sullivan Road, Englewood Cliffs, NJ 07632.

10,000 Medical Words, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

Michigan Uniform Procedures Code Book, Blue Cross/Blue Shield of Michigan, Detroit, MI.

The New American Medical Dictionary & Health Manual, The New American Library, Incorporated, 1301 Avenue of the Americas, New York, NY 10019.

Office Career Guide For The Business Office, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

Physician's Desk Reference, Medical Economics Company.

The Reference Guide To Word Processing Education (Educator's Advisory Council, I.W.P.A.) 1015 North York Road, Willow Grove, PA 19090.

Reference Manual For Office Personnel, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Seybold Publications, Incorporated. (reports on Word Processing), Box 644, Media PA 19063; (215)565-2480.

Speedwriting Medical Dictionary, Bobbs-Merrill. Education Publication, 4300 West 62nd Street, Indianapolis, IN 46206.

Standard Handbook For Secretaries, Gregg/MeGraw-Hill Book Company.

Urdang Dictionary of Current Medical Terms, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016.

Webster's Medical Office Handbook, Merriam Webster, G&C Merriam Company.

Webster's Secretarial Handbook, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

The Word Desk Set (3)--The Right Word, The Written Word, The Word Book, Houghton-Mifflin, 1900 S. Batavia, Geneva, IL 60134.

Word Processing Report, Geyer McAllister Publications, Incorporated, 51 Madison Avenue, New York, NY 10010.

The Word Processing Book (A refernece manual for Word Processing), John Wiley & Sons Incorporated, 605 Third Avenue, New York, NY 10010.

ZIP Code Directory, Oppenheim Press.

VII, Textbooks, Workbooks, and Practice Sets For Medical Secretaries

Basic Medical Terminology, Bobbs-Merrill Company, Incorporated, 4300 West 62nd Street, Indianapolis, IN 46206.

Business English (Text Workbook) John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016.

Business Equipment and the Courts: Guide for Court Managers, Publications Department, National Center for State Courts, 1660 Lincoln Street, Suite 200, Denver, CO 80264.

The Business Office, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

The Business of Oral Communication Fundamentals, South-Western Publication Company, 5101 Madison Road, Cincinnati, OH 45227.

The Complete Guide To Effective Dictation, Jean Gonazlez, Kent Publishing Company, Ten Davis Drive, Belmont, CA 94002.

Dartnell's Glossary of Word Processing Terms, The Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, IL 60640.

Electronic Printing Calculator (Text workbook) South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

English Style Skill Builders, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

Filing Made Easy (Filing simulation) Houghton-Mifflin, 1900 South Batavia, Geneva, IL 60134.

Guidebook To Word Processing Work Measurement, Arthur Thursland, International Work Processing Association, Maryland Road, Willow Grove, PA 19090.

How 2, A Handbook For Office Workers, Second Edition, Clark & Clark, Wadsworth Publishing Company, Incorporated, Belmont, CA 94002.

How To Improve Medical Office Financial Controls, (Pegboard Accounting Systems) Safeguard Business Systems, Incorporated, 725 South Adams, Birmingham, MI 48011 (313)646-7323.

Introduction to Word Processing, Alltech Publishing, Pennsauken, NJ 08110.

Introduction To Word Processing, Bobs-Merrill Educational Publication, 4300 West 62nd Street, Indianapolis, IN 46206.

Introduction To Word Processing, Johnson & Quible, Winthrop Publishers, Incorporated, 17 Dunster Street, Cambridge, MA 02138 (1981).

IWP Packet Series, Part One: Selected Articles For The Word Processing Novice, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Machine Transcription and Dictation, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016.

Machine Transcription In Modern Business, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016.

Machine Transcription Word Processing, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Mail Flow (Module), Michigan State University, Marketing Division, Instructional Media Center, East Lansing, MI 48824.

Management In Word Processing Operations, Paula Cecil, Cummings Publishing Company, Menlo Park, CA 94025 (1980).

Management Introduction To Word Processing, Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402.

Managment's Guide To Word Processing, Kleinschrod, Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, IL 60640.

Medical Office Assistant of Administrative and Clinical, W B. Saunders Company, (1976).

Medical Office Procedures, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011 (1981).

Medical Office Management Handbook, Career Publishing, Incorporated, 931 North Main Street, P.O. Box 5486, Orange, CA 92667.

The Medical Secretary, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

Medical Secretary-Receptionist Simulation (Workbook-Hardbook Simulation), Milady Publication Company, 2829 White Plains Road, Bronx, NY 10467.

Medical Terminology, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016.

Medical Typing Practice, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

Mercury Systems, Incorporated (A.W.P./Information Process Simulation) Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

Metropoex Clinic (Typing Simulation), Houghton-Mifflin Company, 1900 South Batavia Avenue, Geneva, IL 60134.

*Office Machines Course (*5th edition) South-Western Publications Company, 5101 Madison Road, Cincinnati OH 45227.

Office Reprographics, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester MO 63011.

Palmetto Insurance Company--The Word Processing Correspondence Secretary (An office job simulation) South-Western Publications Company, 5101 Madison Road, Cincinnati OH 45227.

Pegboard Accounting System (A student simulation packet), Reed Office Systems, 2883 East Paris Avenue, Grand Rapids, MI 49506.

Processing Outgoing Mail and Postal Information (modules), Competency Based Vocational Education Unit, Bureau of Vocational Education, Kentucky Department of Education, 1912 Capital Plaza Tower, Frankfort, KY 40601.

Proofreading Precision (a text workbook), South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Secretarial Office Procedures, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Starting A Revolution In Office Efficiency, Geyer-McAllister Publications, Incorporated, 51 Madison Avenue, New York, NY 10010.

A Textbook For Medical Assistant, C.O. Mosby Company, St. Louis, MO.

Transcription Skills For Information Processing (text workbook), Gregg/McGraw-Hill Book Company, 13995 Manchester Road, Manchester, MO 63001.

Typing Edited Copy For Word Processing, Dictation Disc Company, 240 Madison Avenue, New York, NY 10016.

Village Garden Center (a pegboard payroll set), South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

The Word Book, Kahm & Mulkerne, Glencoe Press, 8701 Wilshire Boulevard, Beverly Hills, CA 90211.

Word Excercises In Alphabetic Filing, Gregg/McGraw-Hill Book Company, 13955 Manchester Road, Manchester, MO 63011.

Word Processing, Anderson and Trotter, Amacom, 135 West 50th Street, New York, NY 10020.

Word Processing, Prentice-Hall Incorporated, Sullivan Road, Englewood Cliffs, NJ 07632.

Word Processing And Employment, A Survey Report, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

The Word Processing Book, An Individualized Learning Guide, Kutie & Huffman, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016 (1980).

Word Processing Career Opportunities, Wagoner, Bureau of Business Research, College of Business, Ball State University, Muncie, IN 47306.

Word Processing Concepts, (text workbook), South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Word Processing Concepts and Applications (practice set), Gregg/McGraw-Hill, 13955 Manchester Road, Manchester, MO 63011.

Word Processing Concepts and Careers, John Wiley & Sons Incorporated, 605 Third Avenue, New York, NY 10016.

Word Processing Curriculum, IBM Office Products Division, Parson's Pond, Franklin Lakes, NJ 07417.

Word Processing Education, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Word Processing Explosion, Konkel and Peck, Office Publications, Incorporated, P.O. Box 1231, Stanford, CT 06904.

Word Processing Fundamentals, Water House, Harper and Row, 10 East 53rd Street, New York, NY 10022.

Word Processing Glossary, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Word Processing Industry Directory, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Word Processing in the Modern Office, Cecil, Cummings Publishing Company, Incorporated, 2727 Sand Hill Road, Menlo Park, CA 94025. Student workbook and teacher's manual available.

Word Processing Occupational Model Part One--The Correspondence Secreatry (AWP text workbook), Milady Publishing Company (MPC).

Word Processing: Operations, Applications & Administration, Bobs-Merrill Educational Publication Company, 4300 West 62nd Street, Indianapolis, IN 46206.

Word Processing Salary Survey (conducted annually), International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Word Processing Skills & Simulations, Bobbs-Merrill Educational Publishing Company, 4300 West 62nd Street, Indianapolis, IN 46206.

Word Processing : A Systems Approach To The Office (textbook) Harcourt-Brace, Jovanovich, Incorporated, 757 Third Avenue, New York, NY 10017.

Writing A Word Processing Grant Proposal, Rosemary Fielden, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

APPENDIX

JOB TITLES AND DESCRIPTIONS FOR WORD PROCESSING PERSONNEL (as defined by the International Information/Word Processing Association)

A. WORD PROCESSING TRAINEE

Entry level position for those having 0-12 months word processing experience. Must have adequate typing skills, good knowledge of grammar, punctuation, spelling and formatting, the ability to use dictionaries, handbooks and other reference materials, and be oriented toward teamwork and the use of machines. A trainee's functions include routine transcription and manipulation of text from various types of source information (dictation, handwritten, etc.). Maintains own production records, and may be required to proofread own work.

B. WORD PROCESSING OPERATOR

The next level up from WP Trainee for those having 6-24 months word processing experience. In addition to having all the qualifications and functions of position A, a word processing operator handles special documents, meets established quality standards, uses all of a machine's text editing functions and is familiar with department terminology and company practices.

C. WORD PROCESSING SPECIALIST I

A word processing operator with a minimum of 18 months experience who can format, produce and revise complicated documents, such as lengthy technical and statistical reports, from complex source information, including the retrieval of text and data from electronic files. Exercises independent action when interpreting instructions to produce a quality document, understands proofreader marks, and assumes full responsibility for document accuracy and completeness. Has a thorough knowledge of center procedures and maintenance of records. May operate word processing equipment in the telecommunications mode.

D. WORD PROCESSING SPECIALIST II/ASSISTANT SUPERVISOR

A person at this level exercises all of the competencies of position C and may act as assistant superviosr. A Word Processing Specialist II is able to operate all the information processing equipment within the installation. Responsibilities include coordinating and assigning work, analyzing requirements, for specific projects, communicating with users, compiling production statistics and recommending changes in center procedures. May also assist in training personnel.

E. PHOTOTYPESETTING SPECIALIST

A word processing operator who enters special codes while keyboarding and revising text that is to be output on a photocomposition system. Has knowledge of points, picas, typefaces, leading, format requirements, production techniques, and other aspects of typesetting and printing.

F. WORD PROCESSING TRAINER

Someone with a minimum of 24 months experience operating word processing systems who spends the majority of time training new operators. May also be responsible for instructing users in dictation methods and other procedures to insure maximum utilization of a wp center. Should make recommendations to management concerning new equipment purchases from the standpoint of ease of use.

G. PROOFREADER
Proofreads typed copy for text content, spelling, punctuation, grammar, and typographical errors. May be responsible for setting grammar and format standards, guidance and/or training of secretaries and principals.

H. WORD PROCESSING SUPERVISOR
With all the competencies of a word processing specialist II, a supervisor is responsible for the operation of a center (or section within a large center). Schedules and coordinates work flow, assists word processing personnel in document production and in establishing and maintaining quality standards. Also anaylzes production data and procedures, identifies potential imporovements and may be responsible partially for budgets and equipment recommendations. Reports to word processing manager.

I. WORD PROCESSING MANAGER
Exempt (salaried). Responsible for the overall operation of a word processing center, including the guidance of supervisors, personnel administration, staff requirements, user liaison and evaluation, design and implementation of future wp systems. Also is responsible for budgets, overall production reports, and coordination of services with administrative support. May also manage the operation of photocopying, printing, mailing or graphics services. In larger organizations, the word processing manager reports to Information Manager.

AA. ADMINISTRATIVE SECRETARY
Someone who works for a group of principals as part of a team under the direction of an administrative support supervisor or manager. Responsibilities include such support functions as filing, photocopying, maintaining calendars, records and lists, and providing special secretarial services, etc.

BB. SENIOR ADMINISTRATIVE SECRETARY
Has a record of exceptional performance. At times may act as assistant to supervisor of an administrative team and is qualified to compose and edit documents for principals, provide research support and perform other para-professional duties. Handles special projects and is fully aware of company standards and practices.

CC. ADMINISTRATIVE SUPPORT SUPERVISOR
May have the responsibilities of position BB in addition to scheduling and administering work flow to a team of administrative secretaries. Responsible for liaision with the training of users who benefit from administrative support. Evaluates staffing requirements, prepares management reports, recommends new methods of handling administrative secretaries. Reports to Administrative Support Manager.

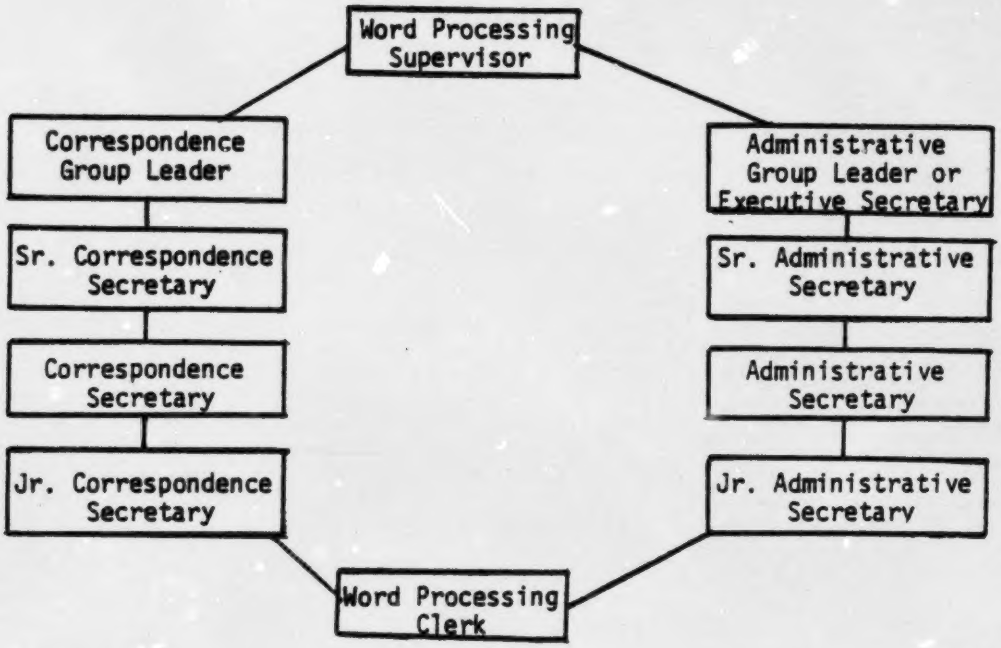
DD. ADMINISTRATIVE SUPPORT MANAGER
Exempt (salaried). Has full responsibility for developing, maintaing and evaluating all services under administrative support within an organization, such as filing, telephone, mail and para-professional support. Monitors the success of the administrative support group and is familiar with the company's goals and objectives. Works closely with the word -

processing manager to ensure cooperation of the two functions. May manage other major administrative duties such as records and retention, microfilm, print shop, purchasing, etc. Reports to Information Manager (in large organizations).

EE. STAFF ANALYST
Exempt (salaried). Responsible for consulting and assisting word processing and administrative support supervisors and managers. Conducts studies, reviews operations and determines and recommneds appropriate staffing, procedures and equipment. Reports to Information Manager or Word Processing Manager or Administrative Support Manager.

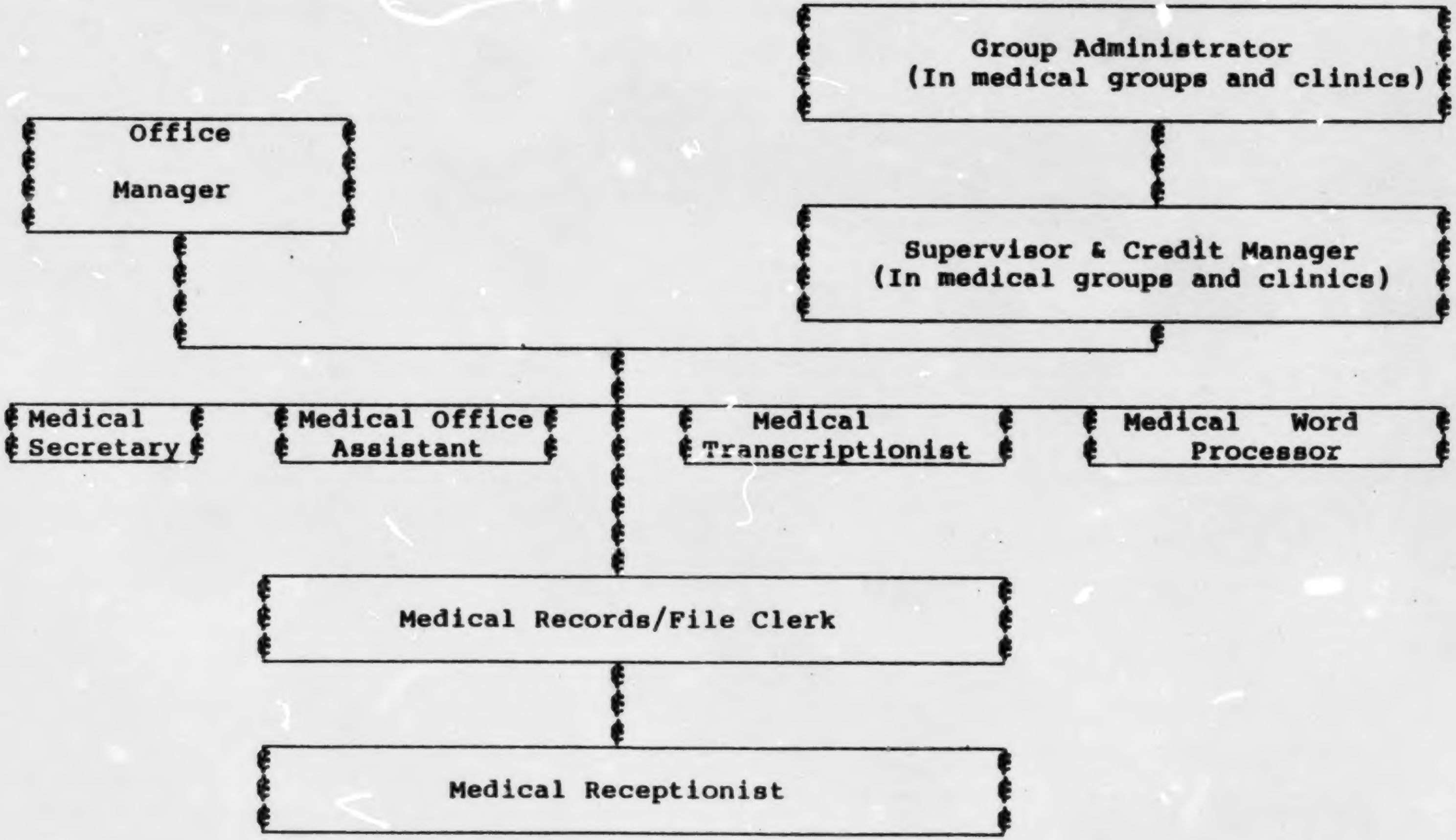
J. INFORMATION MANAGER
Exempt (salaried). Has total responsibility for all aspects of an organization's office system, including word processing, administrative support and other information processing functions. Ensures the collaboration of all support functions. May report to vice president or chief executive office in some organizations.

EXAMPLE OF A WORD PROCESSING CAREER PATH

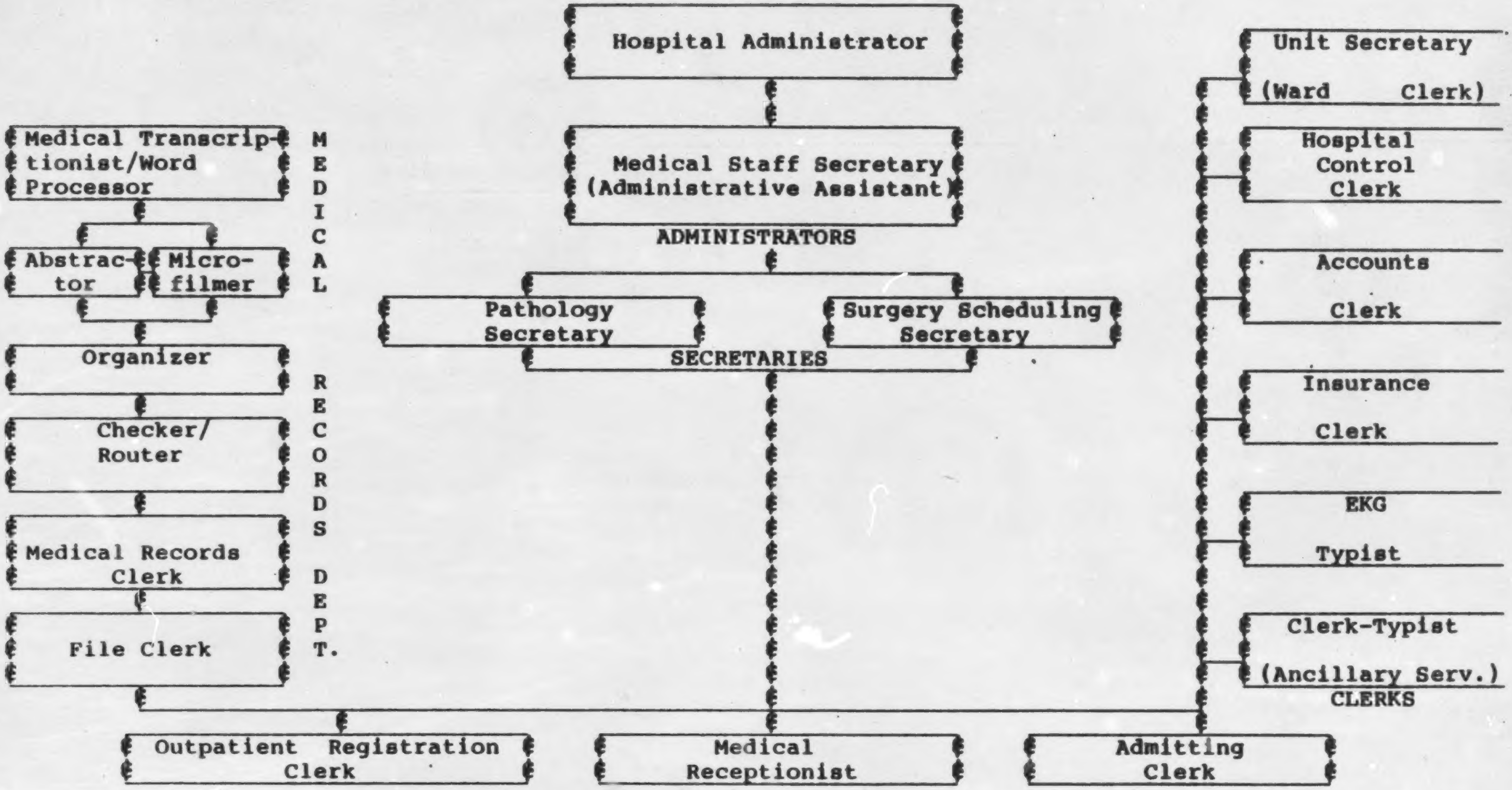

Word Processing Supervisor
Correspondence Group Leader
Administrative Group Leader or Executive Secretary
Sr. Correspondence Secretary
Sr. Administrative Secretary
Correspondence Secretary
Administrative Secretary
Jr. Correspondence Secretary
Jr. Administrative Secretary
Word Processing Clerk

*C. Paty Kozlowski, "Word Processing: What are Educators Facing Today", Balance Sheet, 62 (October, 1980), 52-56

MEDICAL SECRETARY OCCUPATIONS CAREER LADDER--MEDICAL OFFICE OR CLINIC


Group Administrator
(In medical groups and clinics)
Office Manager
Supervisor & Credit Manager
(In medical groups and clinics)
Medical Secretary
Medical Office Assistant
Medical Transcriptionist
Medical Word Processor
Medical Records/File Clerk
Medical Receptionist

MEDICAL SECRETARY OCCUPATIONS CAREER LADDER--HOSPITAL


Hospital Administrator
Medical Staff Secretary (Administrative Assistant)
ADMINISTRATORS
Pathology Secretary
Surgery Scheduling Secretary
SECRETARIES
Medical Transcriptionist/Word Processor
Abstractor
Microfilmer
Organizer
Checker/ Router
Medical Records Clerk
File Clerk
MEDICAL RECORDS DEPT.
Unit Secretary (Ward Clerk)
Hospital Control Clerk
Accounts Clerk
Insurance Clerk
EKG Typist
Clerk-Typist (Ancillary Serv.)
CLERKS
Outpatient Registration Clerk
Medical Receptionist
Admitting Clerk

*SAMPLE FOR MEASURING WORD PROCESSING DOCUMENT PRODUCTION BY LINES

Measure Production by Lines

Instruct students to type a line-count guide:

1	Double	Single	1
	Spacing	Spacing	2
2			3
			4
3			5
			6

Make an overlay transparency for each student.
Be consistent in counting lines of letters, memorandums, and documents with both single and double spacing.

Evaluate in Terms of Error Percentage

Total Errors ÷ Total Lines = Error %

6 errors, 187 lines: 600 (add two zeros) ÷ 187 = 3.21%

or

6.00 ÷ 187 = .0321 = 3.21%

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*SAMPLE FOR LOGGING WORD PROCESSING PRODUCTION WORK

Logging Production Work

Date	Time In	Job Description	Type of Document	Input Form	Lines	Errors	Time Out	Minutes
4-18	9:10	To B Barge	L M R S	L R S	32	1		
		To Sales Dept	L M R S	L R S	24	0	9:30	20

TYPE OF DOCUMENT

L Letter
M Memorandum
R Report
S Statistical

INPUT FORM

L Longhand
R Rough Draft
S Straight Copy

Total Lines 187

Total Errors 6

Error Percentage 3.21%

Total Minutes 95

Lines Per Minute 1.97

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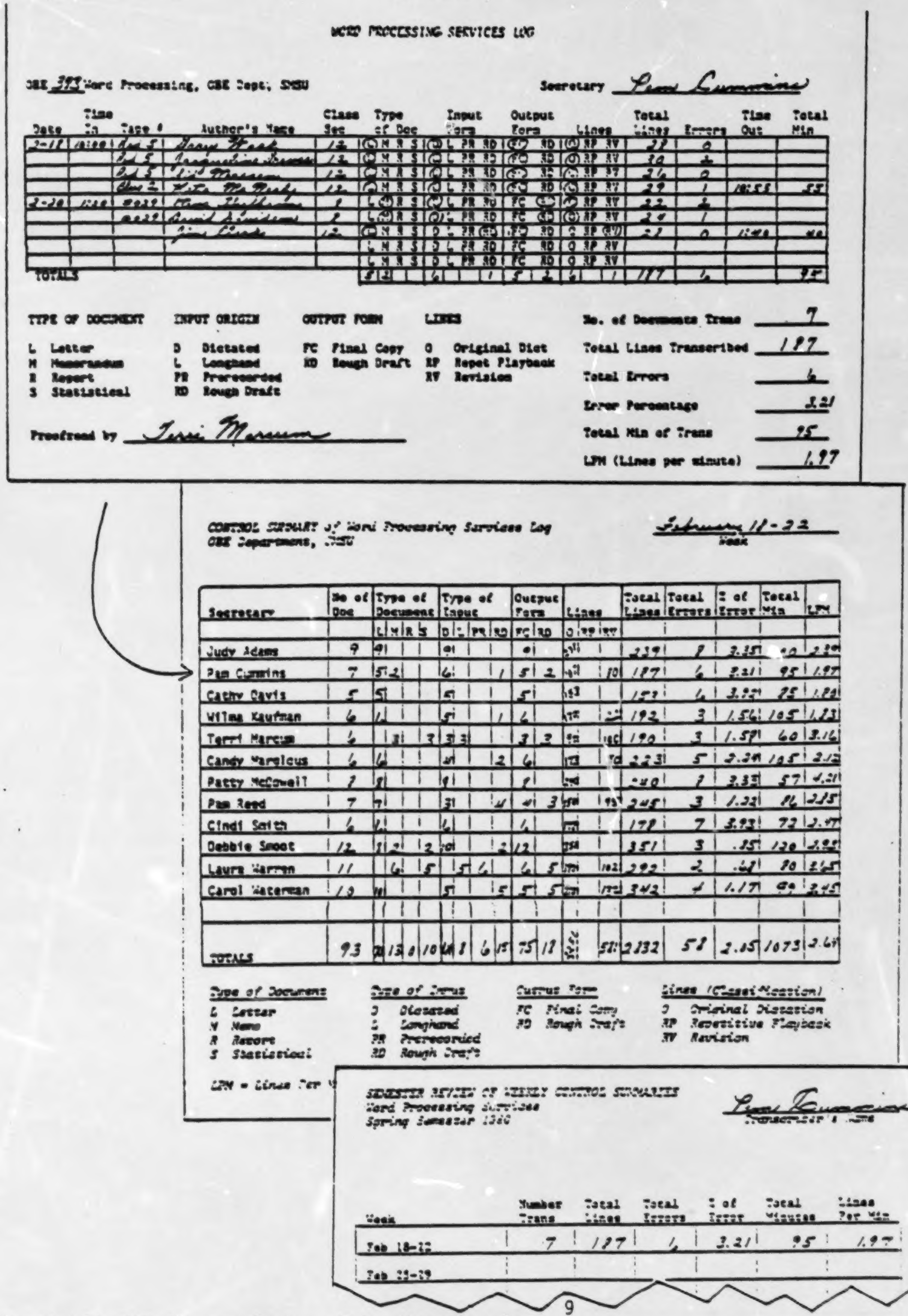
*SAMPLE



WORD PROCESSING SERVICES LOG

OBE 393 Word Processing, OBE Dept, SMSU

Secretary Pam Cummins

Date	Time In	Tape #	Author's Name	Class Sec	Type of Doc	Input Form	Output Form	Lines	Total Lines	Errors	Time Out	Total Min
2-18	10:00	Cas 5	Harry Hook	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	27	0		
		Cas 5	Jacqueline Brown	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	30	2		
		Cas 5	[illegible] Thomason	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	26	0		
		Class 2	Kate McNealy	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	29	1	10:55	55
2-20	11:00	#039	Tom Shellhorn	8	L [✓ M] R S	[✓ D] L PR RD	FC [✓ RD]	[✓ O] RP RV	22	2		
		#039	David Smithson	8	L [✓ M] R S	[✓ D] L PR RD	FC [✓ RD]	[✓ O] RP RV	24	1		
			Jim Clark	12	[✓ L] M R S	D L PR [✓ RD]	[✓ FC] RD	O RP [✓ RV]	29	0	11:40	40
					L M R S	D L PR RD	FC RD	O RP RV				
					L M R S	D L PR RD	FC RD	O RP RV				
TOTALS					5 2	6 1	5 2	6 1	187	6		95

TYPE OF DOCUMENT
L Letter
M Memorandum
R Report
S Statistical

INPUT ORIGIN
D Dictated
L Longhand
PR Prerecorded
RD Rough Draft

OUTPUT FORM
FC Final Copy
RD Rough Draft

LINES
O Original Dict
RP Repet Playback
RV Revision

No. of Documents Trans 7
Total Lines Transcribed 187
Total Errors 6
Error Percentage 3.21
Total Min of Trans 95
LPM (Lines per minute) 1.97

Proofread by Terri Marcum

CONTROL SUMMARY of Word Processing Services Log
OBE Department, SMSU

February 18-22
Week

Secretary	No of Doc	Type of Document L	M	R	S	Type of Input D	L	PR	RD	Output Form FC	RD	Lines O	RP	RV	Total Lines	Total Errors	% of Error	Total Min	LPM
Judy Adams	9	9				9				9		[illegible]			239	8	3.35	[illegible]	2.39
Pam Cummins	7	5	2			6			1	5	2	[illegible]		10	187	6	3.21	95	1.97
Cathy Davis	5	5				5				5		[illegible]			157	6	3.82	85	1.84
Wilma Kaufman	6	6				5			1	6		[illegible]		[illegible]	192	3	1.56	105	1.83
Terri Marcum	6		3		3	3	3			3	3	[illegible]		[illegible]	190	3	1.57	60	3.16
Candy Marsicus	6	6				4			2	6		[illegible]		[illegible]	223	5	2.24	105	2.12
Patty McDowell	8	8				8				8		[illegible]			240	8	3.33	57	4.21
Pam Reed	7	7				3		4		4	3	[illegible]		[illegible]	245	3	1.22	86	2.85
Cindi Smith	6	6				6				6		[illegible]			178	7	3.93	72	2.47
Debbie Smoot	12	8	2		2	10			2	12		[illegible]			351	3	.85	120	2.92
Laura Warren	11		6		5		5	6		6	5	[illegible]		102	292	2	.68	80	3.65
Carol Waterman	10	10				5			5	5	5	[illegible]		[illegible]	342	4	1.17	99	3.45
TOTALS	93	70	13	0	10	68	8	6	15	75	18	[illegible]		51	2232	58	2.05	1073	2.64

Type of Document
L Letter
M Memo
R Report
S Statistical

Type of Input
D Dictated
L Longhand
PR Prerecorded
RD Rough Draft

Output Form
FC Final Copy
RD Rough Draft

Lines (Classification)
O Original Dictation
RP Repetitive Playback
RV Revision

LPM = Lines Per M

SEMESTER REVIEW OF WEEKLY CONTROL SUMMARIES
Word Processing Services
Spring Semester 1980

Pam Cummins
Transcriber's Name

Week	Number Trans	Total Lines	Total Errors	% of Error	Total Minutes	Lines Per Min
Feb 18-22	7	187	6	3.21	95	1.97
Feb 25-29						

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*GENERAL GUIDELINES FOR DETERMINING LINE COUNT BASED ON A STANDARD 60 SPACE CHARACTER LINE OF TYPE

For a letter:

1 line for the date, inside address, and salutation.
1 line for complimentary close, signature block, and reference lines.
1 line for each line typed in the body of the letter.
1 line for each envelope to be addressed.

For a memo:

1 line for each line typed in body
1 line for all lines preceding the body (the inside address").
1 line for signature, initials, and reference notations.

Tables:

1 line for each line typeed including headings, full line rulings and footnotes.

Manuscripts:

1 line for each line typed. On a double-spaced manuscript, count only the actual lines of typing. If footnotes are used, the line dividing the body of the manuscript and the footnotes is counted as a line. One line count is allowed for each line of footnote typing.

*Lois E. Petersen and Leonard B. Kruk, "Measuring Typewriting Output," Business Education Forum, 32 (1978), pp. 14, 15

CO-OP GUIDELINES FOR SECRETARIAL AND RELATED PROGRAMS

Several instructional designs are available to the clerical/secretarial office education student which will enable him/her to become eligible for an office education job assignment.

DESIGN ONE

Grade 11	Grade 12	
Preparatory Instruction Approved and Funded Two-Hour Office Block	Approved and Funded One Hour Office Related	Co-op Job Assignment

In Design One, a student may enroll in an eleventh grade two-hour vocationally approved and funded Business/Office Education block if he/she has satisfied the prerequisites for entrance into that specific O.E. Code block; prerequisite options are typing and/or stenography. If the student becomes sufficiently skilled at tasks pertinent to occupations within that O.E. Code block, the student may be placed in a related co-op job assignment in his/her eleventh grade year whenever the teacher and co-op coordinator deem the student ready. The eleventh grade block is considered to be the related class. Job readiness occurs when the student has successfully completed the performance objectives/tasks necessary for the co-op experience and the job duties listed on the training agreement.

In his/her senior year, the student may enroll in a funded twelfth grade one-hour related class in conjunction with co-op.

DESIGN TWO

Grade 11	Grade 12	
Preparatory Instruction Approved and Funded Two-Hour Office Block	Related Instruction Approved and Funded Two-Hour Office Block	Co-op Job Assignment

*One Hour of a
Two-Hour Block

In Design Two, a student may enroll in an eleventh grade two-hour vocationally approved and funded Business/Office Education block if he/she has satisfied the prerequisites for entrance into that specific O.E. Code block; prerequisite options are typing and/or stenography. If the student becomes sufficiently skilled at tasks pertinent to occupations within that O.E. Code block, the student may be placed in a co-op job assignment in his/her eleventh grade year whenever the teacher and co-op coordinator deem the student ready. The eleventh grade block is considered to be, in that case, a related class. Job readiness occurs when the student has successfully completed the performance objectives/tasks necessary for the co-op experience and the job duties listed on the training equipment.

In his/her senior year, the student may enroll in instruction consisting of one hour of an approved and funded Business/Office Education block related to his/her co-op job assignment. Of course, the student may opt for a two-hour block in the twelfth grade. With technology becoming more sophisticated, and education becoming increasingly expensive, a student truly interested in a business office education career, should strongly consider enrolling in two blocks during his/her high school career.

NOTE: It is the responsibility of the local school district to keep accurate attendance records for all students attending two-hour blocks for only one hour.

DESIGN THREE

Grade 11	Grade 12	
Prerequisites: Typing and/or Stenography	Preparatory and Related Instruction Approved and Funded Two-Hour Office Block	Co-op Job Assignment

In Design Three, a student may enroll in a twelfth grade two-hour vocationally approved and funded Business/Office Education block if he/she has satisfied the prerequisites for entrance into that specific O.E. Code block; prerequisite options are typing and/or stenography. The block is considered to be the related class; and the student may be placed in a co-op job assignment his/her senior year if the co-op coordinator certifies that the student has successfully completed the performance objectives/tasks necessary for the co-op experiences and the job duties listed on the training agreement.

As illustrated, the student has not enrolled in any previous block class; however, he/she may have taken typing or stenography as prerequisites to the twelfth grade block.